

# The**Raiser's**Edge<sup>®</sup> Enterprise<sup>™</sup>

PostalSaver Guide for Canada

## **033109**

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# PostalSaver Guide for Canada

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## What Is In This Guide?

The *PostalSaver Guide for Canada* provides information about qualifying for presortation discounts on mailings. *PostalSaver* is a valuable tool that automates the process of sorting mailings and filling out reports to save you time and effort in qualifying mailings for Canada Post discounts. This guide includes the following information.

- “Install and Update PostalSaver” on page 6
- “Qualify for Presortation Discounts” on page 16
- “Requirements” on page 16
- “Run the Sort Wizard to Set PostalSaver Options” on page 18
- “Load PostalSaver Options from a Parameter File” on page 45



## How Do I Use These Guides?

*The Raiser’s Edge Enterprise* user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser’s Edge* documentation from several places.

**User Guides.** You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser’s Edge bar in the program. You can also access the guides on our Web site at [www.blackbaud.com](http://www.blackbaud.com). From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

**Help File.** In addition to user guides, you can learn about *The Raiser’s Edge* by accessing the help file in the program. Select **Help, The Raiser’s Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter “Load Defaults”. The help file searches for the complete phrase in quotes instead of individual words.

## Icons

The following icons are used in the side margins to denote additional information such as notes, warnings, time-savers, or definitions. You can also use these margins to write your own notes.

W e l c o m e



The notepad symbol designates a note or tip related to the information in the main text column.



The traffic light indicates a cautionary note. Generally, we use this icon to point out a step that may have unwanted results.



The clock symbol designates a shortcut or timesaving action.



The dictionary symbol designates the definition of a frequently used term.

# PostalSaver Tab and Presortation Discounts

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Mailings are important to your work as a nonprofit organisation. *PostalSaver* is a valuable tool that enhances ***The Raiser's Edge*** and automates the process of sorting mailings and filling out reports. This saves you time and effort in qualifying mailings for postal discounts,


When you use the *PostalSaver*, the PostalSaver tab appears on most *Mail* tasks. With your selections on the PostalSaver tab, you create a parameter file that defines how to sort the mailing according to Canada Post regulations. You can print required reports complete with information. *PostalSaver* and the PostalSaver tab help you qualify for reduced rates offered for barcoded and sorted mailings.

You can use the PostalSaver tab in several *Mail* tasks.

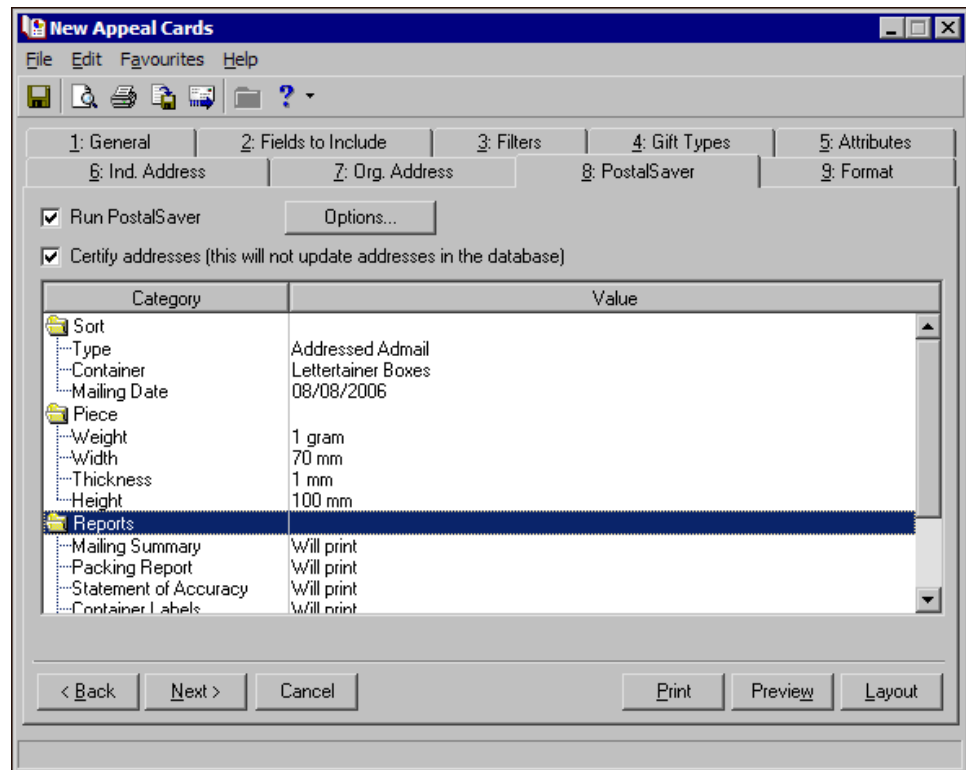
- Appeal Cards
- Membership Cards
- Phonathon Forms
- Pledge Reminders
- Receipts
- Renewal Notices
- Envelopes
- Labels
- Donor Acknowledgement Letters
- Follow-Up Letters
- Honour/Memorial Acknowledgement Letters
- Volunteer Follow-Up Letters

For more information about Canada Post addressing and mail presortation requirements, we recommend you see the *Canada Postal Guide* and the *National Presortation Schematic* (NPS). To receive these Canada Post publications, contact the Canada Post National Philatelic Centre at 1-800-565-4362.

 Some *Mail* tasks require additional information to activate the PostalSaver tab.

 *PostalSaver* is updated every two months. To make sure you have the most current version before you run *PostalSaver*, visit the Downloads page of the Blackbaud Web site at <http://downloads.blackbaud.com>. For information about downloading and updating *PostalSaver*, see "Install and Update PostalSaver" on page 6.

If you include the **Delivery Mode Code** field on the Fields to Include tab, you can use the PostalSaver tab to sort your mailing and qualify for discounts offered by Canada Post.




**Run PostalSaver.** To use the PostalSaver tab to sort a mailing according to Canada Post guidelines, mark **Run PostalSaver**. All selections on the PostalSaver tab are enabled.

#### **Certify addresses (this will not update addresses in the database).**

When you use *AddressAccelerator* as your data service, you can certify all the addresses in a specific mailing before you print the mailing. To certify, mark **Certify addresses**. Changes to addresses are not updated on the constituent record. You must manually update changed addresses on the constituent record.

**Options.** To set up how the program uses *PostalSaver* to sort your mailing, click **Options**. You can select to run the Sort Wizard to set up the *PostalSaver* options or load the option settings from an existing parameter file to use as a template.

 The **Certify addresses** checkbox appears only if you use *AddressAccelerator* as your data service and, in User Options, enter a valid path to the *AddressAccelerator* data files. For more information, see the *Data Enrichment Services Guide for Canada*.

## Frequently Used Terms

To effectively use *Mail* tasks for your organization's fundraising efforts, you should have a basic understanding of common mail terms. If you find an unfamiliar term when reading this or any guide in *The Raiser's Edge Enterprise* documentation, search the online glossary in the help file.

**Bundle facing slip.** For Distribution Centre Facility (DCF) and Residue groupings, you must attach a facing slip, or bundle label, to the top of a mixed bundle mailing to show its destination. For more information, see “Mailing Reports” on page 36.

**CPC.** CPC is an abbreviation for Canada Post Corporation.

**Delivery Mode Code.** The Delivery Mode Code (DMC) is required for Incentive Lettermail High Density and Low Density Presort, Addressed Admail, Dimensional Addressed Admail, and Publications Mail. The DMC printed on a mailing piece directs it to a specific type of delivery route. The DMC consists of the Delivery Mode Audit Code and the Delivery Mode Details. To run *PostalSaver* discount on the PostalSaver tab, you must select the **Delivery Mode Code** field on the Fields to Include tab of a mail task in *The Raiser’s Edge*.

**Distribution Centre Facility.** A Distribution Centre Facility (DCF) is a major postal facility where mail is received, sorted, handled, and sent to or received from a group of dependent postal facilities. This is the third level of consolidation as per the NPS.

**Keeper tag.** A keeper tag, or bag label, is a piece of thin cardboard with a colour-coded bar and information to be inserted in the label holder on mail bags to show the destination and contents of the bag. For more information, see “Mailing Reports” on page 36.

**NPS.** NPS stands for *National Presortation Schematic* (formerly known as the *National Distribution Guide, Part B*). This Canada Post publication outlines mail presortation schematics required to do mail presortation to direct facilities or consolidation points.

**Postal Classifications.** The following postal classifications determine how to sort your mailing and the discounts you are eligible for, depending on the type of mailing:

- Addressed Admail
- Dimensional Addressed Admail
- Incentive Lettermail
- Publications Mail

For more information, see “Postal Classifications” on page 32.

**Postal Code.** The Postal Code is a coding system that identifies the post office or metropolitan area associated with an address. The postal code is a vital part of all addresses in Canada. It is made up of two elements, each comprised of three characters: the Forward Sortation Area (FSA) and the Local Delivery Unit (LDU). The FSA, or the first section of the postal code, represents a geographic area (e.g. K1A). The LDU, or the last three characters (numeric - alpha - numeric) of the postal code, represents a specific point or set of points of call located within the area identified by the FSA.

**Presortation discounts.** For more information about Canada Post addressing and mail presortation requirements, see the *Canada Postal Guide* and the *National Presortation Schematic* (NPS). To receive these Canada Post publications, contact the Canada Post National Philatelic Centre at 1-800-565-4362.



If you use *AddressAccelerator* as your data service, update the *AddressAccelerator* data files instead. When you update *AddressAccelerator*, both *PostalSaver* and *AddressAccelerator* files update. For more information about *AddressAccelerator*, see the *Data Enrichment Services Guide for Canada*.

**Residue.** A residue grouping is a mixed grouping of mailing pieces. No minimum number of pieces exists for this category. Residue mail is mail that you cannot make in accordance with the NPS. It must be labelled and worded at the office of deposit. This applies to Addressed Admail, Dimensional Addressed Admail, and Publications mail only.

**Tie-on bag tag.** A tie-on tag is an eyelet tag which must be affixed to a mail bag with strong or plastic cable ties. For more information, see “Mailing Reports” on page 36.

## Install and Update PostalSaver

The *PostalSaver* data files are updated every two months. To access the information in the *PostalSaver* data files, you must download and install them from [www.blackbaud.com](http://www.blackbaud.com).

If you work on a network, you can install the data files on the server or in a shared folder on any computer all users can access. To link the files to *The Raiser's Edge*, you must enter the path to the data files in User Options.

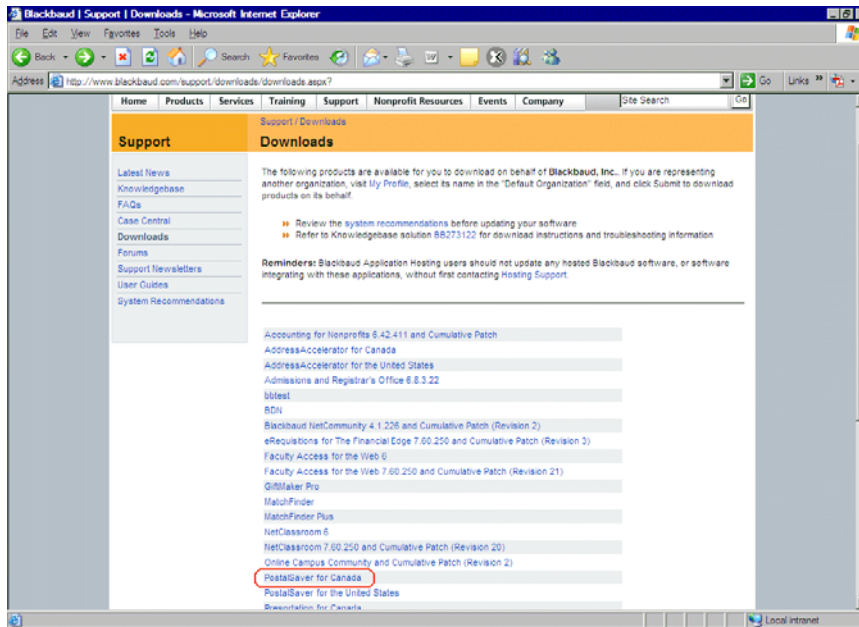
After you install the *PostalSaver* data files on a workstation or server for the first time, you must also update Satori *MailRoom ToolKit*. *PostalSaver* uses *MailRoom ToolKit* to sort your mailing and take advantage of presortation discounts.

Canada Post updates the Presortation data files every month. To access the information in the Presortation data files, you must also download and install them from [www.blackbaud.com](http://www.blackbaud.com).


## ➤ Download and install the PostalSaver data files


The *PostalSaver* data files are updated every two months. To access the information in the *PostalSaver* data files, such as to update or install on a workstation for the first time, you must download and install them from [www.blackbaud.com](http://www.blackbaud.com).

1. Access the Downloads page of the Blackbaud Web site at <http://downloads.blackbaud.com>.

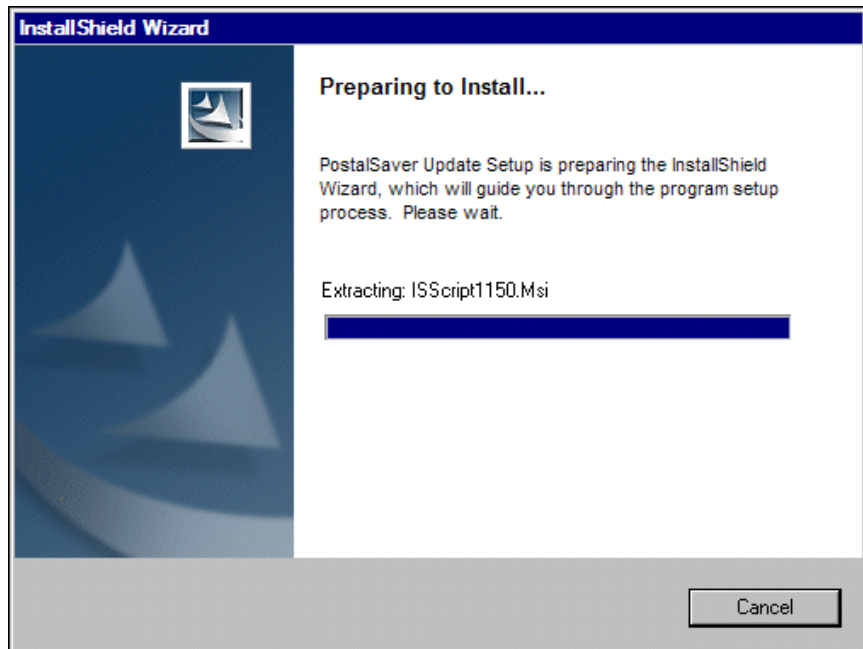


2. Click **PostalSaver for Canada**. The latest *PostalSaver* files appear for download.
3. Download and install any relevant *PostalSaver* updates.

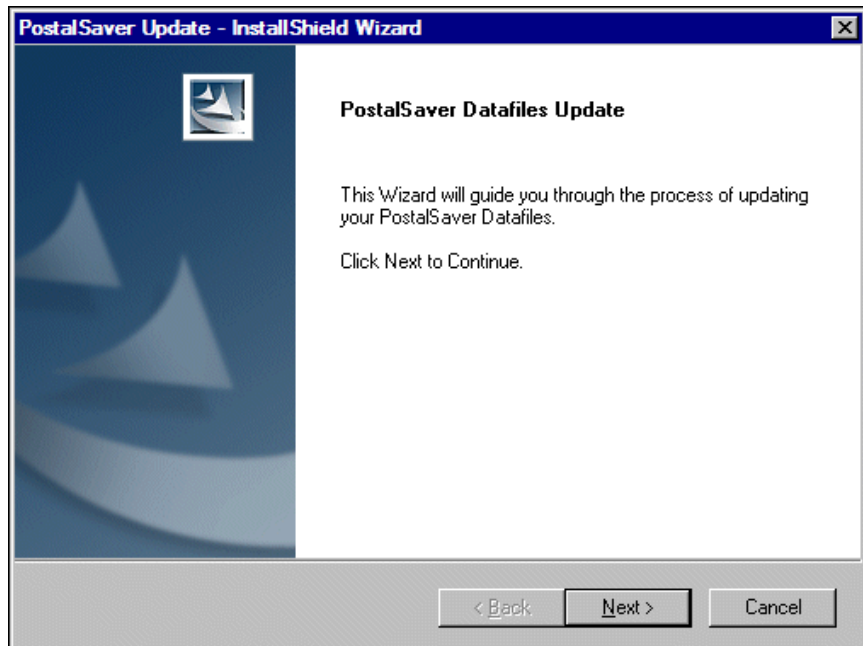
 The Downloads page is a secured resource on the Blackbaud Web site. To access the Downloads page, you must log in.

 Download and installation instructions are included on the Downloads page. Read all **Notes** included with the download instructions.

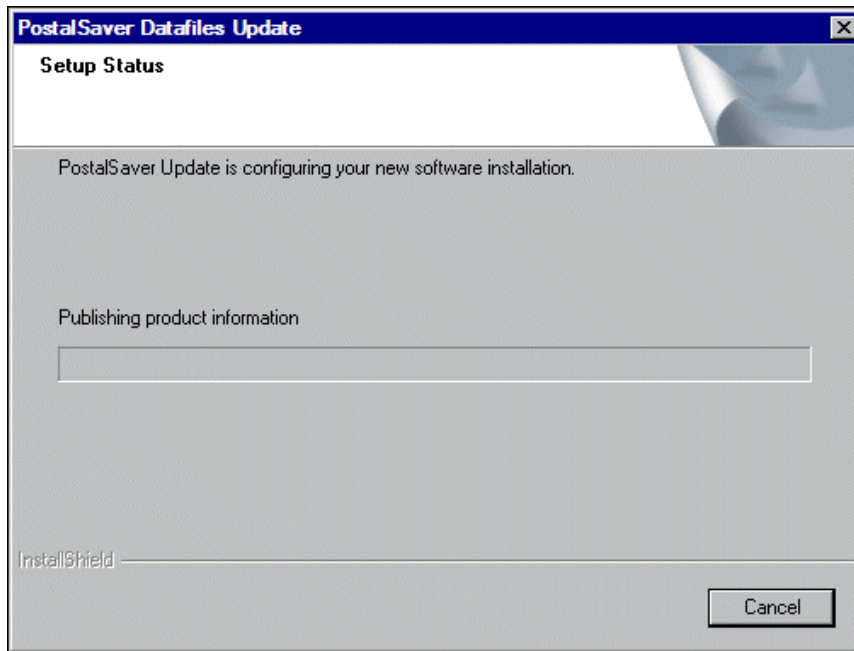
4. Access and run the downloaded PostalSaverDatafiles.exe file. The InstallShield Wizard Preparing to Install screen appears.



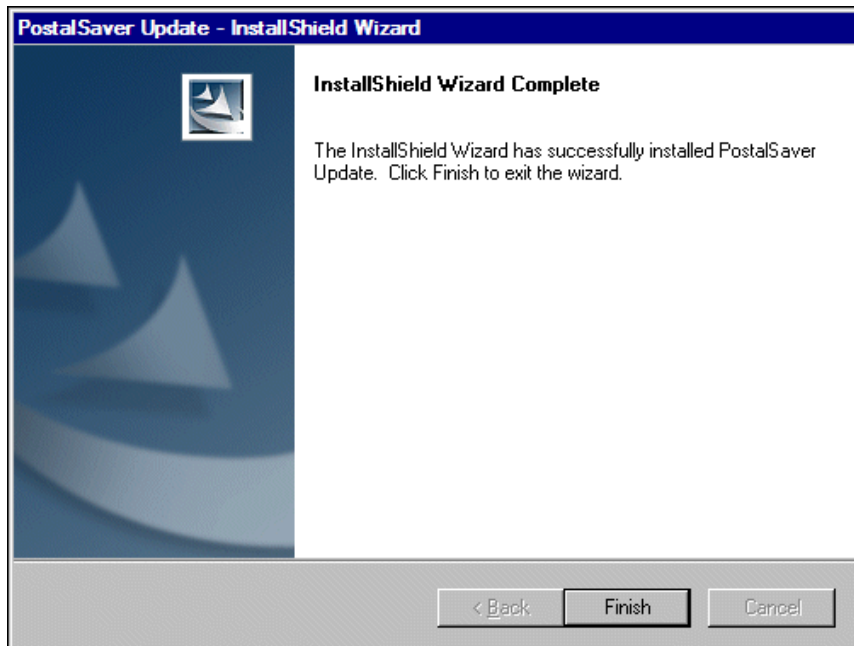
When the wizard is ready, the PostalSaver Datafiles Update screen appears.



5. Click **Next**. The wizard installs the *PostalSaver* data files, and the Setup Status screen tracks the installation progress.





When the installation is complete, the InstallShield Wizard Complete screen appears.




6. Click **Finish**.



 *PostalSaver* uses Satori *MailRoom ToolKit* to help sort your mailing and take advantage of presortation discounts.

 By default, the *PostalSaver* data files are installed at C:\Program Files\Blackbaud\Postal Tools.

 When you update the existing *PostalSaver* data files on a workstation or server, the *MailRoom ToolKit* update files are automatically installed.

7. After you first install the *PostalSaver* data files on a workstation of server, install the Satori *MailRoom ToolKit* update files. If you install the *PostalSaver* data files on a server, install the *MailRoom ToolKit* update files on each workstation to use *PostalSaver*. For a procedure on how to install the *MailRoom ToolKit* update files, see “Install the MailRoom ToolKit update files” on page 10.
8. After you update the *PostalSaver* data files and install the *MailRoom ToolKit* update files (if necessary), update the Presortation data files. For information about how to update the Presortation data files, see “Download and install the Presortation data files” on page 13.
9. Log into *The Raiser’s Edge*.
10. On the menu bar, select **Tools, User Options**. The Options screen appears.
11. Select the File Locations tab.
12. On the **AddressAccelerator Data Files** row of the grid, click in the **Location** column. An ellipsis appears.
13. Enter the path to the *PostalSaver* data files.  
To map to the location, click the ellipsis. The Browse for Folder screen appears so you can locate the data files. When you locate the files, select the folder and click **OK**. You return to the File Locations tab, and the selected **Location** appears in the **AddressAccelerator Data Files** row.
14. Click **Apply**.
15. Click **OK**. You return to the shell page of *The Raiser’s Edge*.

You can now use *PostalSaver* to sort your mailing and take advantage of presortation discounts. For information about *PostalSaver* and presortation discounts, see “Qualify for Presortation Discounts” on page 16.

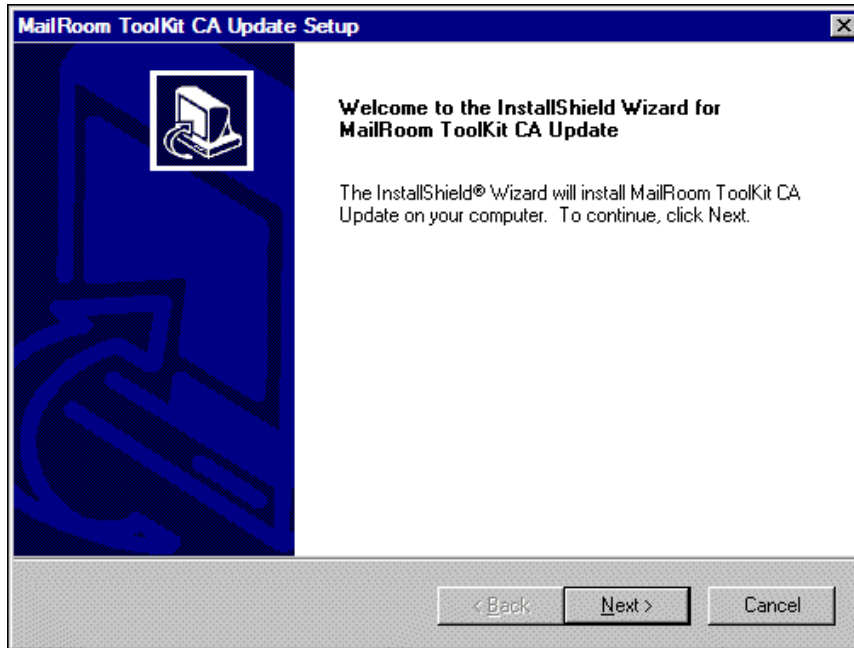
### ➤ **Install the MailRoom ToolKit update files**

After you first install the *PostalSaver* data files on a workstation or server for the first time, run the installation wizard to install the Satori *MailRoom ToolKit* update files. If you install the *PostalSaver* data files on a server, you must install the *MailRoom ToolKit* update files on each workstation to use *PostalSaver*. *PostalSaver* uses *MailRoom ToolKit* to help sort your mailing and take advantage of presortation discounts.

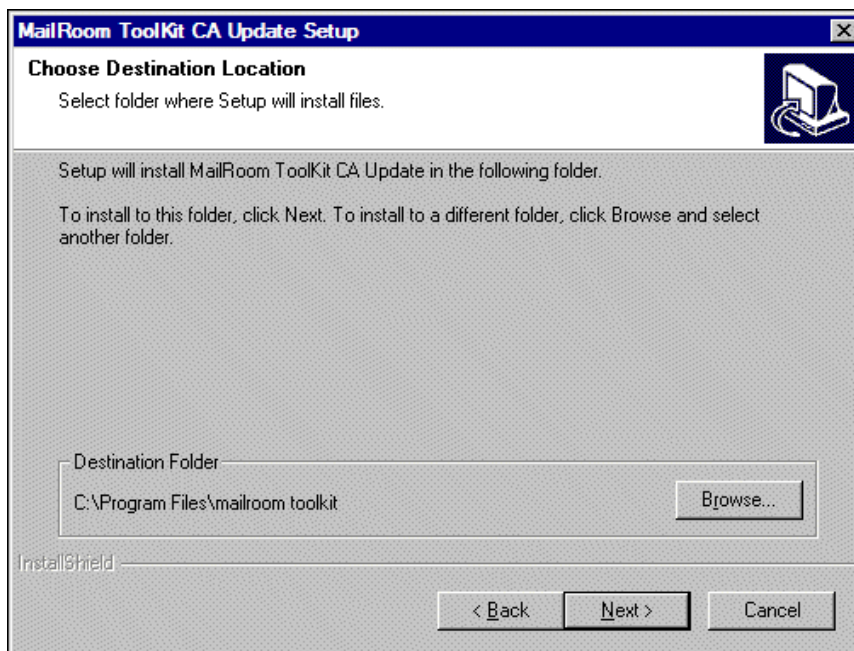
1. Update the *PostalSaver* data files. For information about how to update the *PostalSaver* data files, see “Download and install the PostalSaver data files” on page 7.
2. Access the Postal Tools directory where you have the *PostalSaver* data files installed on the workstation. By default, the location is C:\Program Files\Blackbaud\Postal Tools.



3. Run the CAUpdate.exe file. The wizard extracts the files needed to install the *MailRoom ToolKit* update files. When the wizard finishes extracting the necessary files, the MailRoom ToolKit CA Update Setup welcome screen appears.

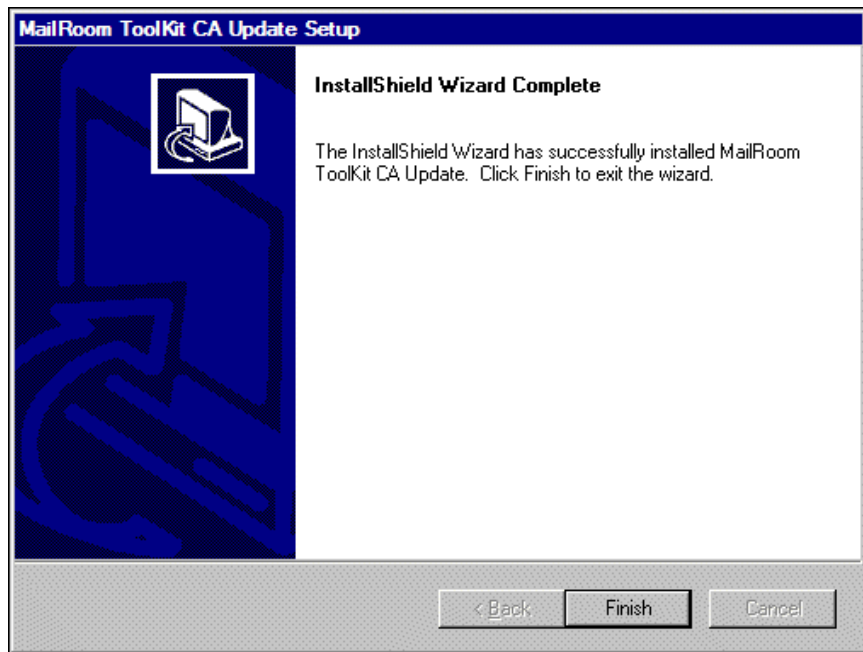


4. Click **Next**. The Choose Destination Location screen appears.



5. In the **Destination Folder** frame, enter the location where you want the wizard to install the *MailRoom ToolKit* update files. By default, the location is C:\Program Files\mailroom toolkit. To map to a different location, click **Browse**.

6. Click **Next**. The wizard installs the *MailRoom ToolKit* update files in the **Destination Folder**. When the update is complete, the InstallShield Wizard Complete screen appears.

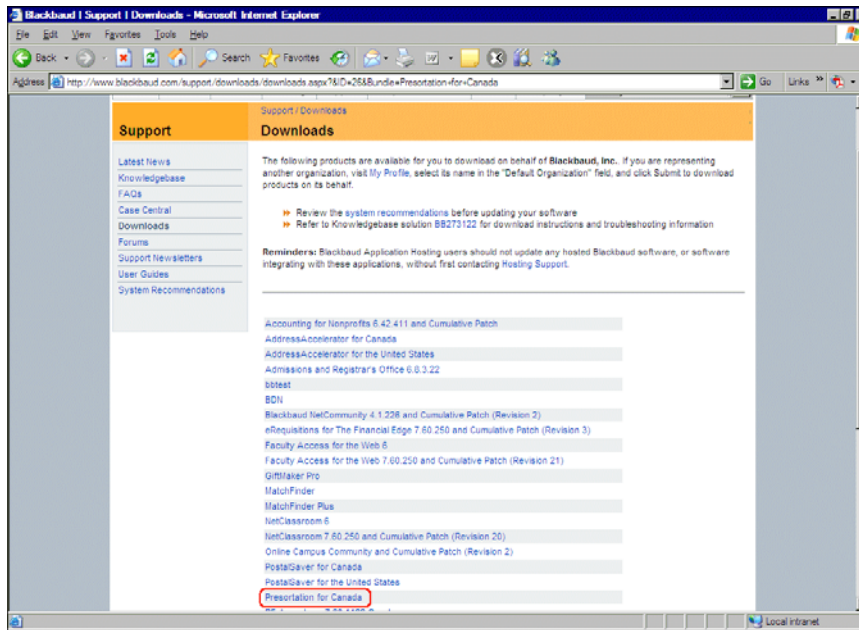


7. Click **Finish**.
8. Update the Presortation data files. For information about how to update the Presortation data files, see "Download and install the Presortation data files" on page 13.

## ➤ Download and install the Presortation data files

To receive specific discount pricing options, Canada Post requires mail preparation and presortation. Canada Post updates the Presortation data files every month. To access the information in the Presortation data files, such as to update or install on a workstation for the first time, you must download and install them from [www.blackbaud.com](http://www.blackbaud.com).

1. Access the Downloads page of the Blackbaud Web site at <http://downloads.blackbaud.com>.

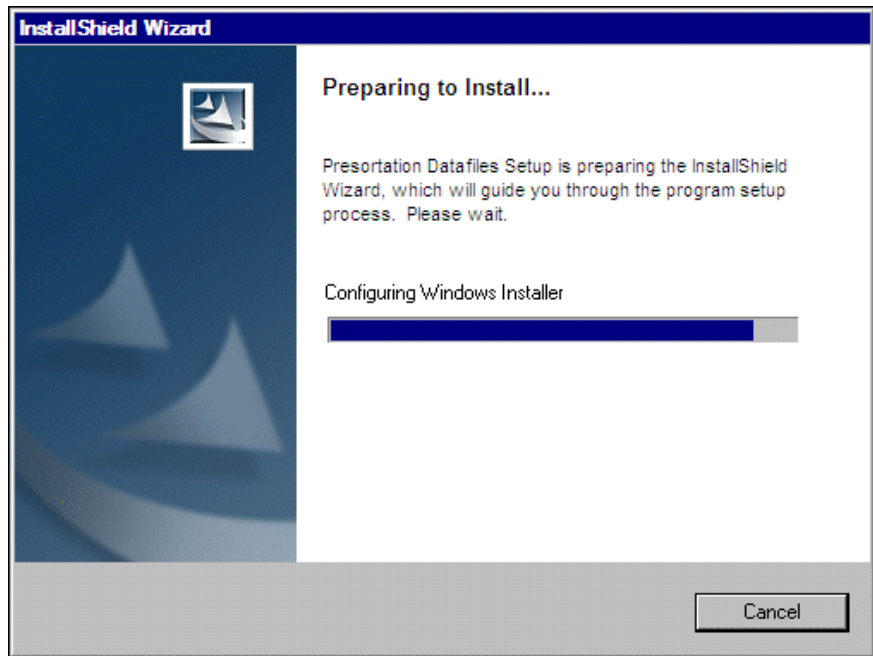


2. Click **Presortation for Canada**. The latest Presortation data files appear for download.
3. Download and install any relevant Presortation updates.
4. Access the downloaded Install directory.

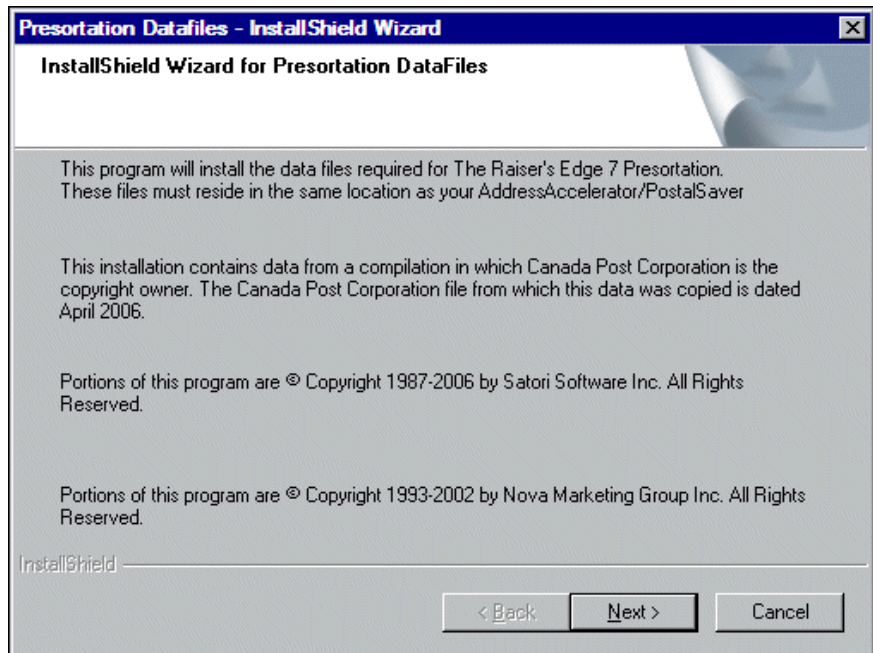
The Downloads page is a secured resource on the Blackbaud Web site. To access the Downloads page, you must log in.

Download and installation instructions are included on the Downloads page. Read all **Notes** included with the download instructions.

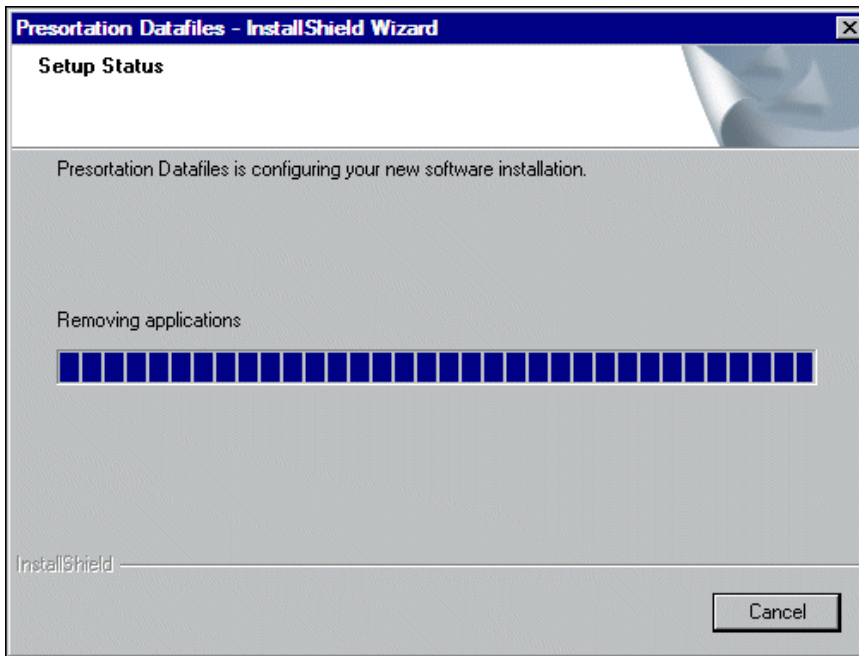
5. Run the PresortationDatafiles.exe file. The InstallShield Wizard Preparing to Install screen appears.



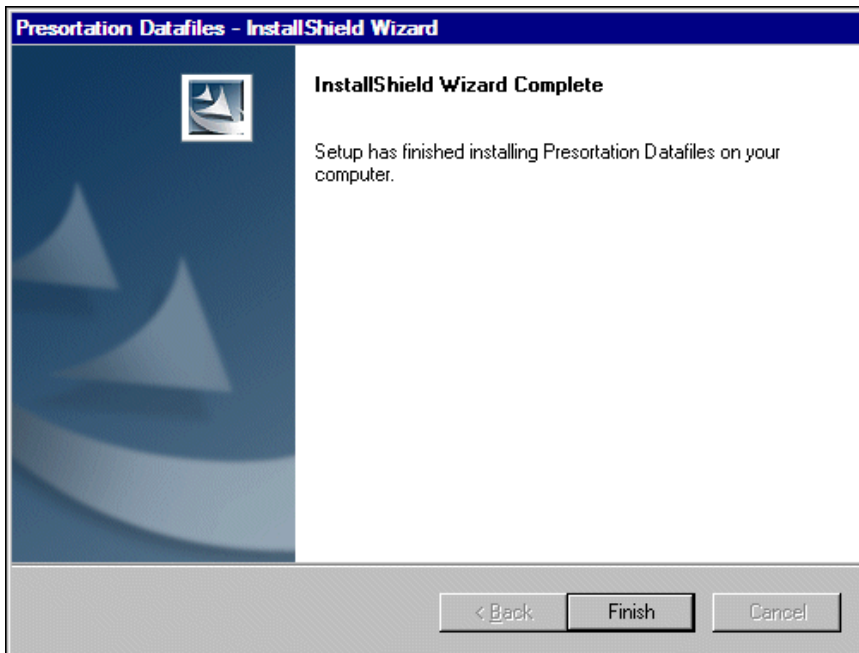
When the wizard is ready, the InstallShield Wizard for Presortation DataFiles screen appears.



6. Click **Next**. The wizard installs the Presortation data files, and the Setup Status screen tracks the installation progress.



When the installation is complete, the InstallShield Wizard Complete screen appears.



7. Click **Finish**.

You can now use *PostalSaver* to sort your mailing and take advantage of presortation discounts. For information about *PostalSaver* and presortation discounts, see “Qualify for Presortation Discounts” on page 16.

## Qualify for Presortation Discounts

To be eligible for certain discounts, you must sort your mailing according to the requirements of Canada Post. If you use *PostalSaver*, the PostalSaver tab appears on most mail tasks in *Mail*. To help you take advantage of the reduced rates for presorted mail, the PostalSaver tab batches and sorts addresses in Postal Code order.

In conjunction with *PostalSaver*, you can use the address correction and certification service *AddressAccelerator* to take full advantage of discount mailing rates offered by Canada Post. For more information about *AddressAccelerator*, see the *Data Enrichment Services Guide for Canada*.

For more information about Canada Post addressing and mail *PostalSaver* requirements, see the *Canada Postal Guide* and the *National Presortation Schematic* (NPS). To receive these Canada Post publications, contact the Canada Post National Philatelic Centre at 1-800-565-4362.

## Requirements

To qualify for postal discounts, your mailing must meet the minimum requirements. If you do not have enough records included in your mailing, a message appears to tell you so.

- Addressed Admail – 1,000 pieces
- Dimensional Addressed Admail – 1,000 pieces
- Incentive Lettermail: Machineable/Low Density – 5,000 pieces
- Incentive Lettermail: High Density – 500 pieces
- Publications Mail: Machineable – 1,000 pieces

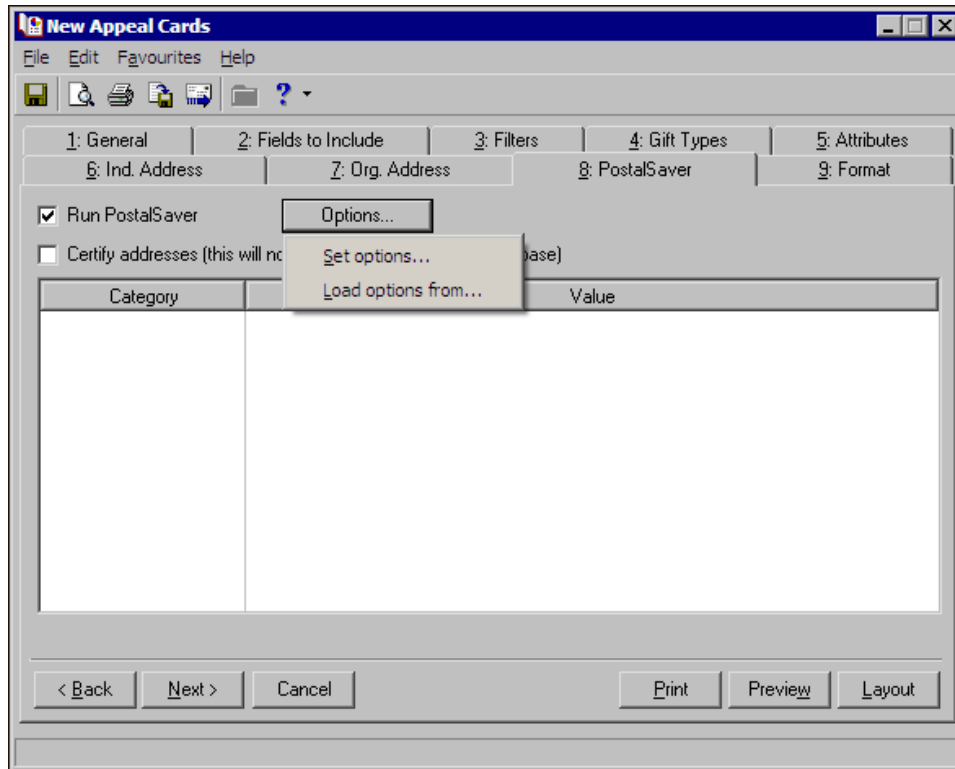
For more information about acquiring permits, contact your local post office.

To preview or print the mailing, click **Yes**. However, you cannot run *PostalSaver* or print reports that should accompany the mailing for postal discount purposes.

If your mailing includes enough records to meet the Canada Post minimum requirements and you still receive this message, check the Presort Options you selected on the Sort Wizard. For more information about Presort Options, see the procedure, “Run the Sort Wizard to Set PostalSaver Options” on page 18.

## Options

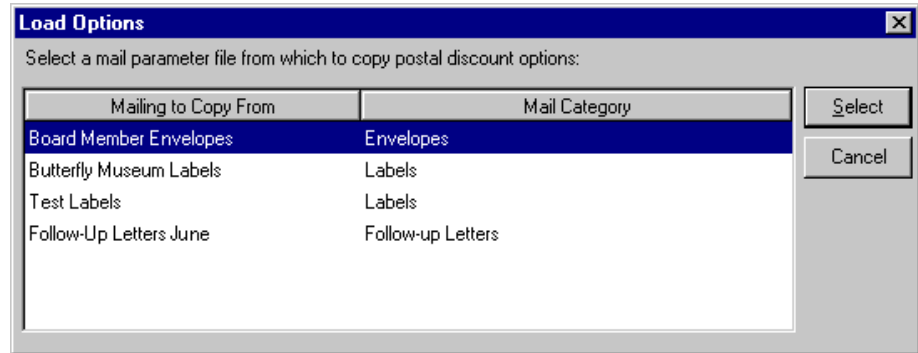
When you mark **Run PostalSaver** on the PostalSaver tab, the **Options** button is enabled. To set up how the program uses *PostalSaver* to sort and batch your mailing, click **Options**. When you click **Options**, a submenu appears.




**Set options.** To create a new parameter file for the mailing, select **Set options**. When you select **Set options**, the Sort Wizard opens so you can create a new parameter file for a mailing. For more information about how to create a new parameter file, see “Run the Sort Wizard to Set PostalSaver Options” on page 18.



**Load options from.** To use an existing parameter file for the mailing, select **Load options from**. When you select **Load options from**, the Load Options screen appears. From the Load Options screen, you can select an existing parameter file from which to copy the PostalSaver options. For more information about copying an existing parameter file, see “Load PostalSaver Options from a Parameter File” on page 45.



## Run the Sort Wizard to Set PostalSaver Options

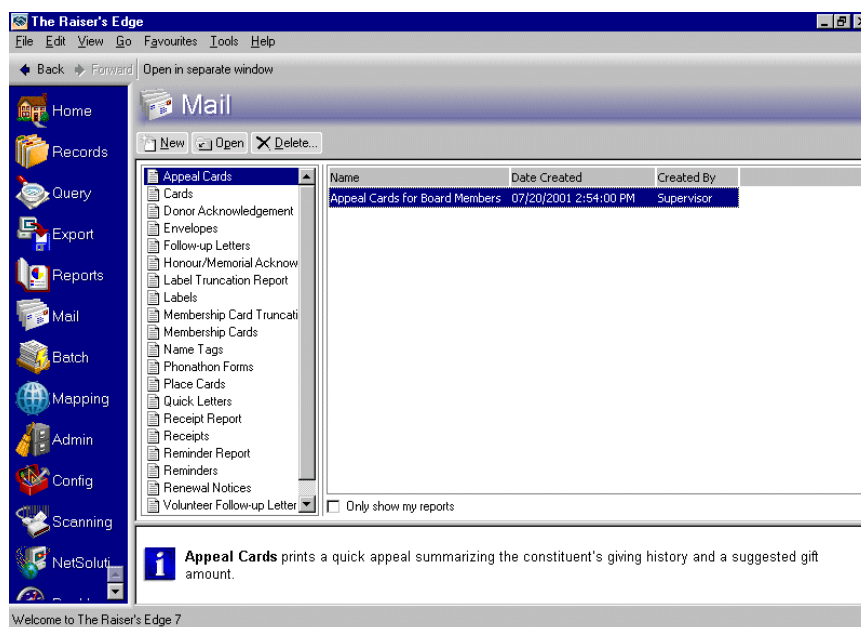
 *PostalSaver* is updated every two months, and the Presortation data files are updated every month. To make sure you have the most current version of the data files before you run *PostalSaver*, visit the Downloads page of the Blackbaud website at <http://downloads.blackbaud.com>. For information about how to download and update *PostalSaver* and the Presortation data files, see “Install and Update PostalSaver” on page 6.

*PostalSaver* automates the process to sort mailings and complete reports to qualify mailings for postal discounts. With your selections on the PostalSaver tab, you create a parameter file that defines how to sort the mailing according to the Postal Code and Canada Post guidelines. To create a new parameter file for the mailing, on the PostalSaver tab, click **Options** and select **Set options**. The Sort Wizard opens so you can create a new parameter file for a mailing.

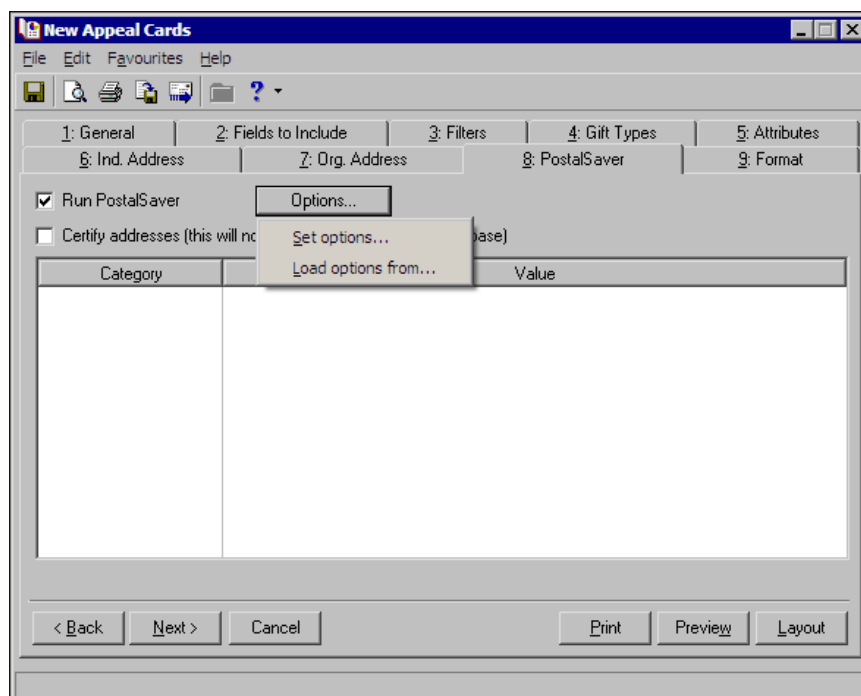



## ➤ Set the PostalSaver options


1. On the Raiser's Edge bar, click **Mail**. The Mail page appears.




2. From the list of mail tasks on the left, select a task.
3. In the grid on the right, select a mailing and click **Open** on the action bar or, to create a new mailing, click **New**. For information about how to create a mailing, see the *Mail Guide*. The new mail task screen appears.
4. Select the PostalSaver tab.
5. Mark **Run PostalSaver**.

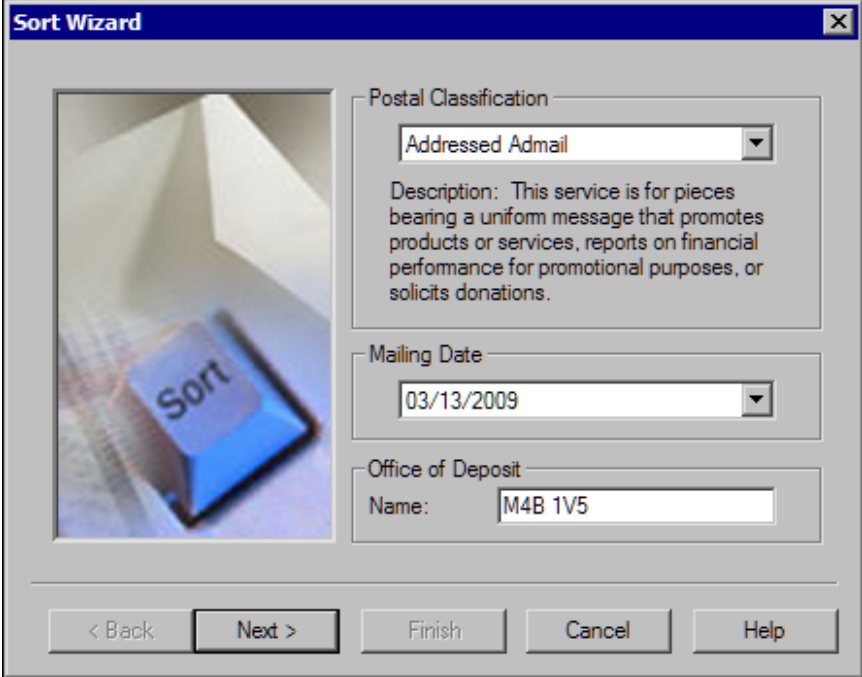


 For this procedure, Appeal Cards is used as an example mail task. Because the steps are similar, procedures for other mail tasks with the PostalSaver tab are not repeated in this section. Depending on which options you choose for other mail tasks, you may skip some of these steps and screens.

 Make sure to include an address field on the Fields to Include tab or the PostalSaver tab is not accessible. On the Fields to Include tab, make sure to also include **Delivery Mode Code** in the **Fields to Export** box or a warning message appears when you try to print the mailing.

 Marking **Certify addresses** certifies the addresses for this particular mailing only. Address information is not corrected or certified on the constituent record. You must manually update changed addresses on the constituent record.

6. If you use *AddressAccelerator* as your data service and, in User Options, enter a valid path to the *AddressAccelerator* data files, the **Certify addresses** checkbox appears. To certify addresses for the mailing, mark this checkbox.
7. To create a new parameter file for the mailing, click **Options** and select **Set options**. The postal classification screen of the Sort Wizard screen appears.

The image shows a Windows-style dialog box titled "Sort Wizard". On the left is a graphic of a white envelope with a blue "Sort" label. On the right, there are three sections: "Postal Classification" with a dropdown menu showing "Addressed Admail" and a description; "Mailing Date" with a dropdown menu showing "03/13/2009"; and "Office of Deposit" with a text field showing "M4B 1V5". At the bottom are five buttons: "< Back", "Next >", "Finish", "Cancel", and "Help".

**Sort Wizard**

**Postal Classification**

Addressed Admail

Description: This service is for pieces bearing a uniform message that promotes products or services, reports on financial performance for promotional purposes, or solicits donations.

**Mailing Date**

03/13/2009

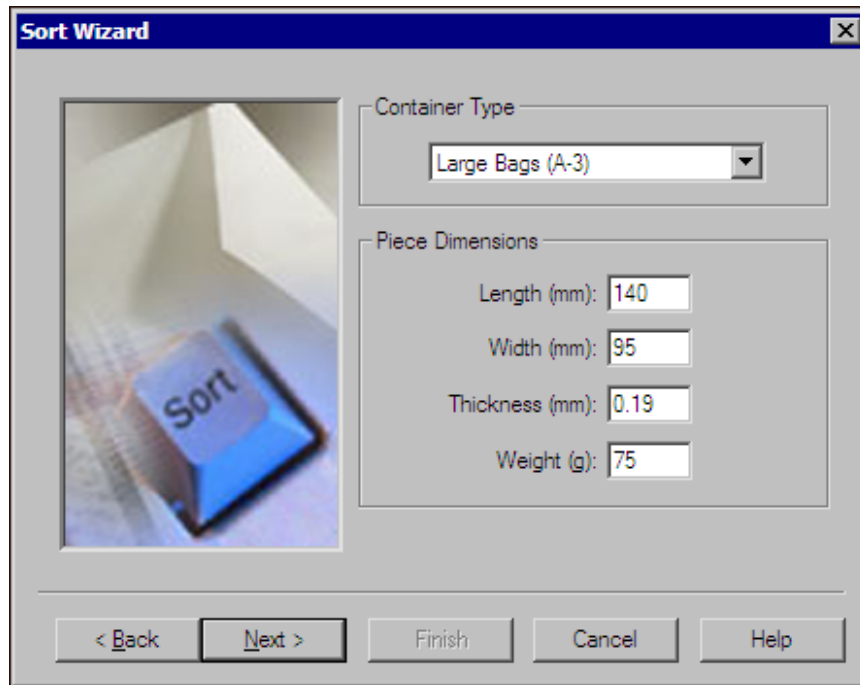
**Office of Deposit**

Name: M4B 1V5

< Back   Next >   Finish   Cancel   Help

On this screen, select the postal service your mailing requires. Also, enter the date of the mailing and the postal code for the post office where you deposit the mailing. For information about this screen, see “Sort Wizard Postal Classification Screen” on page 31.

8. Click **Next**. The Sort Wizard container type and piece dimensions screen appears.



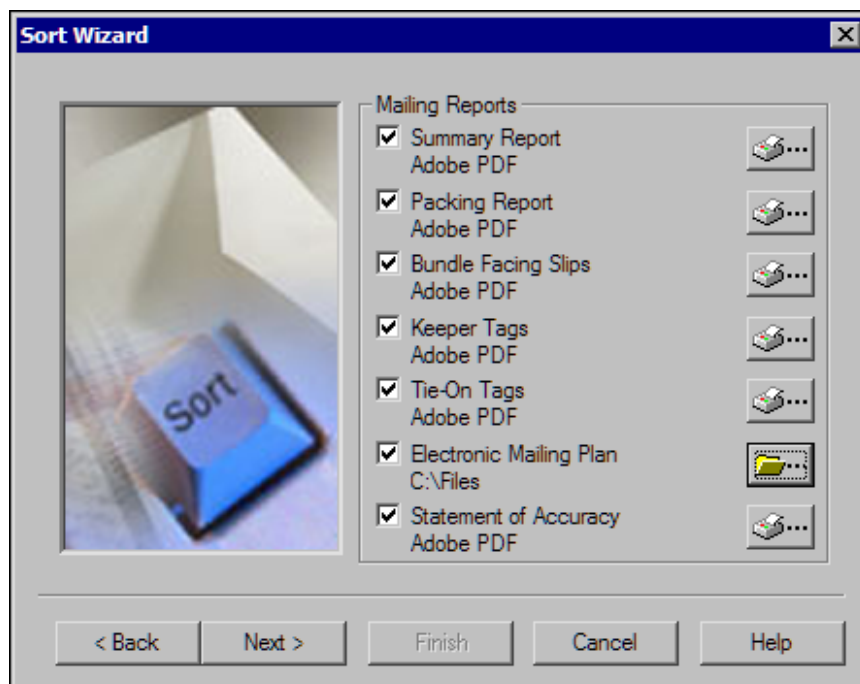
The Sort Wizard dialog box is shown with the following settings:

- Container Type:** Large Bags (A-3)
- Piece Dimensions:**
  - Length (mm): 140
  - Width (mm): 95
  - Thickness (mm): 0.19
  - Weight (g): 75

Buttons at the bottom: < Back, Next >, Finish, Cancel, Help.

On this screen, select the type of container used to deposit the mailing at the post office. Also, enter the dimensions of an individual mail piece representative of the mailing. For information about this screen, see “Sort Wizard Container Type and Piece Dimensions Screen” on page 33.

9. Click **Next**. The Sort Wizard mailing reports screen appears.



The Sort Wizard dialog box is shown with the following settings:

- Mailing Reports:**
  - ☒ Summary Report Adobe PDF
  - ☒ Packing Report Adobe PDF
  - ☒ Bundle Facing Slips Adobe PDF
  - ☒ Keeper Tags Adobe PDF
  - ☒ Tie-On Tags Adobe PDF
  - ☒ Electronic Mailing Plan C:\Files
  - ☒ Statement of Accuracy Adobe PDF

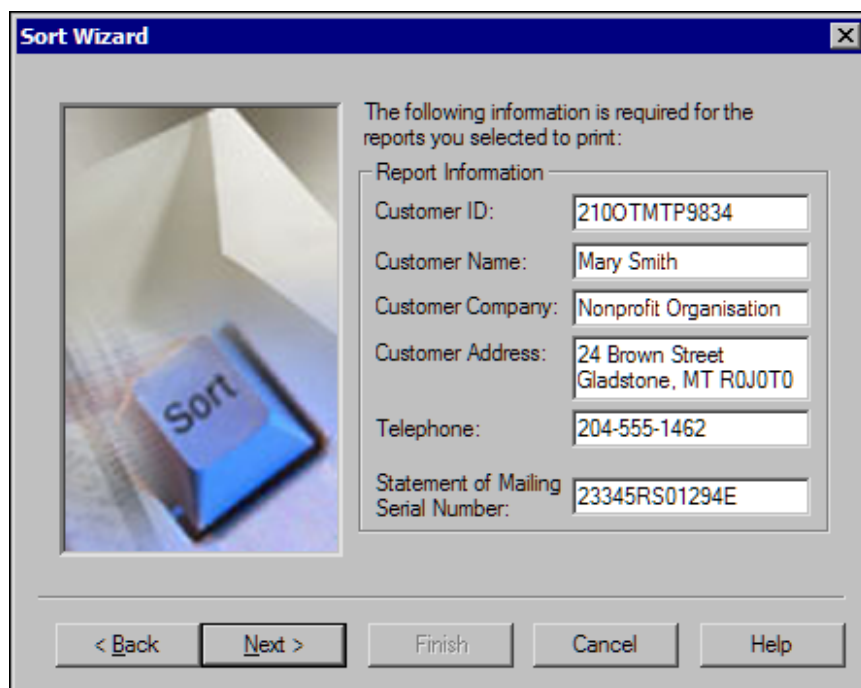
Buttons at the bottom: < Back, Next >, Finish, Cancel, Help.

On this screen, select which mailing reports and labels to print. Also, configure and designate the printer to print each report. The reports and labels that appear vary depending on the selected **Container Type**. For information about this screen, see “Sort Wizard Mailing Reports Screen” on page 35.

10. Click **Next**.

- If you mark **Summary Report, Packing Report, or Statement of Accuracy**, the Sort Wizard report information screen appears. Go to step 11.
- If you mark **Bundle Facing Slips** but *not* **Summary Report, Packing Report, or Statement of Accuracy**, the Sort Wizard bundle facing slips information screen appears. Go to step 13.
- If, on the Sort Wizard container type and piece dimensions screen, you select a container type of “Large Bags (A-3)” or “Small Bags (A-6)” and, on the Sort Wizard mailing reports screen, mark **Keeper Tags** but *not* **Summary Report, Packing Report, Bundle Facing Slips, or Statement of Accuracy**, the Sort Wizard keeper tags information screen appears. Go to step 15.
- If, on the Sort Wizard container type and piece dimensions screen, you select a container type of “Large Bags (A-3)” or “Small Bags (A-6)” and, on the Sort Wizard mailing reports screen, mark **Tie-On Tags** but *not* **Summary Report, Packing Report, Bundle Facing Slips, Keeper Tags, or Statement of Accuracy**, the Sort Wizard tie-on tags information screen appears. Go to step 17.
- If, on the Sort Wizard container type and piece dimensions screen, you select a container type of “Hard Sided Containers” and, on the Sort Wizard mailing reports screen, mark **Container Labels** but *not* **Summary Report, Packing Report, Bundle Facing Slips, or Statement of Accuracy**, the Sort Wizard container labels information screen appears. Go to step 19.
- If, on the Sort Wizard container type and piece dimensions screen, you select a container type of “Hard Sided Containers” and, on the Sort Wizard mailing reports screen, mark **Separator Card Labels** but *not* **Summary Report, Packing Report, Bundle Facing Slips, Container Labels, or Statement of Accuracy**, the Sort Wizard separator card labels information screen appears. Go to step 21.
- If you select to not print any reports, labels, tags, or slips or mark only **Electronic Mailing Plan**, the Summary Information screen appears. Go to step 23.

11. On the Sort Wizard report information screen, enter your organization's information to appear on the selected mailing reports. For information about this screen, see "Sort Wizard Report Information Screen" on page 37.



The following information is required for the reports you selected to print:

Report Information

Customer ID: 2100TMTP9834

Customer Name: Mary Smith

Customer Company: Nonprofit Organisation

Customer Address: 24 Brown Street  
Gladstone, MT 00J0T0


Telephone: 204-555-1462

Statement of Mailing Serial Number: 23345RS01294E

< Back Next > Finish Cancel Help

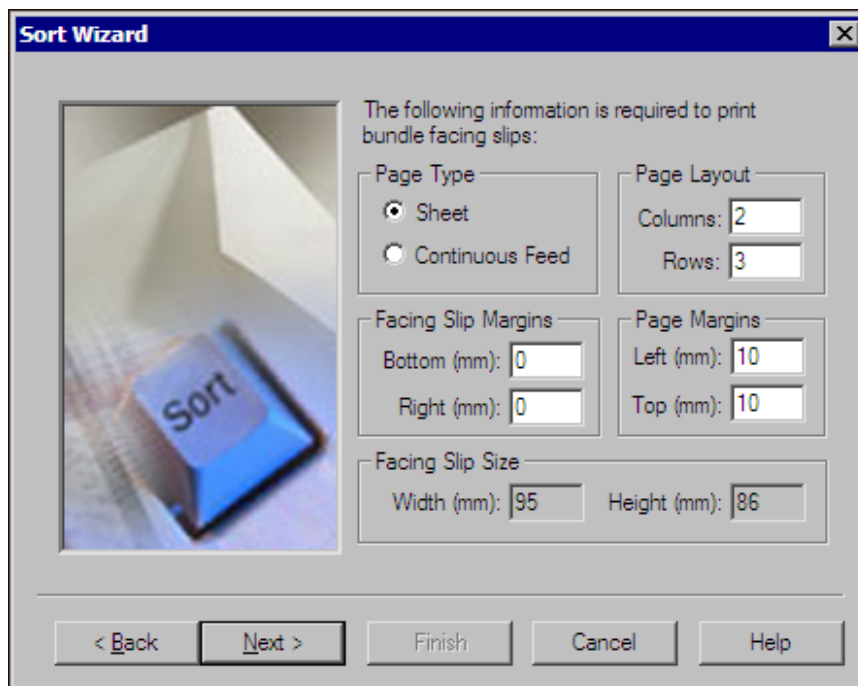
12. Click **Next**.

- If, on the Sort Wizard mailing reports screen, you mark **Bundle Facing Slips**, the Sort Wizard bundle facing slips information screen appears. Go to step 13.
- If, on the Sort Wizard container type and piece dimensions screen, you select a container type of "Large Bags (A-3)" or "Small Bags (A-6)" and, on the Sort Wizard mailing reports screen, mark **Keeper Tags** but *not* **Bundle Facing Slips**, the Sort Wizard keeper tags information screen appears. Go to step 15.
- If, on the Sort Wizard container type and piece dimensions screen, you select a container type of "Large Bags (A-3)" or "Small Bags (A-6)" and, on the Sort Wizard mailing reports screen, mark **Tie-On Tags** but *not* **Bundle Facing Slips** or **Keeper Tags**, the Sort Wizard tie-on tags information screen appears. Go to step 17.
- If, on the Sort Wizard container type and piece dimensions screen, you select a container type of "Hard Sided Containers" and, on the Sort Wizard mailing reports screen, mark **Container Labels** but *not* **Bundle Facing Slips**, the Sort Wizard container labels information screen appears. Go to step 19.
- If, on the Sort Wizard container type and piece dimensions screen, you select a container type of "Hard Sided Containers" and, on the Sort Wizard mailing reports screen, mark **Separator Card Labels** but *not* **Bundle Facing Slips** or **Container Labels**, the Sort Wizard separator card labels information screen appears. Go to step 21.

 You must securely fasten a bundle facing slip, or bundle label, to each bundle that is not a Level 1 Delivery Facility bundle. The bundle facing slip must indicate the *National Presortation Schematic* (NPS) routing information and the Postal Classification.

- If you select to not print any labels, tags, or slips, the Summary Information screen appears. Go to step 23.

13. On the Sort Wizard bundle facing slips information screen, enter the information required to print the bundle facing slips for your mailing. For information about this screen, see “Sort Wizard Bundle Facing Slips Information Screen” on page 39.



The following information is required to print bundle facing slips:


<b>Page Type</b> <input checked="" type="radio"/> Sheet <input type="radio"/> Continuous Feed	<b>Page Layout</b> Columns: <input type="text" value="2"/> Rows: <input type="text" value="3"/>
<b>Facing Slip Margins</b> Bottom (mm): <input type="text" value="0"/> Right (mm): <input type="text" value="0"/>	<b>Page Margins</b> Left (mm): <input type="text" value="10"/> Top (mm): <input type="text" value="10"/>
<b>Facing Slip Size</b> Width (mm): <input type="text" value="95"/> Height (mm): <input type="text" value="86"/>	

< Back   Next >   Finish   Cancel   Help

14. Click **Next**.


- If, on the Sort Wizard container type and piece dimensions screen, you select a container type of “Large Bags (A-3)” or “Small Bags (A-6)” and, on the Sort Wizard mailing reports screen, mark **Keeper Tags**, the Sort Wizard keeper tags information screen appears. Go to step 15.
- If, on the Sort Wizard container type and piece dimensions screen, you select a container type of “Large Bags (A-3)” or “Small Bags (A-6)” and, on the Sort Wizard mailing reports screen, mark **Tie-On Tags** but *not* **Keeper Tags**, the Sort Wizard tie-on tags information screen appears. Go to step 17.
- If, on the Sort Wizard container type and piece dimensions screen, you select a container type of “Hard Sided Containers” and, on the Sort Wizard mailing reports screen, mark **Container Labels**, the Sort Wizard container labels information screen appears. Go to step 19.
- If, on the Sort Wizard container type and piece dimensions screen, you select a container type of “Hard Sided Containers” and, on the Sort Wizard mailing reports screen, mark **Separator Card Labels** but *not* **Container Labels**, the Sort Wizard separator card labels information screen appears. Go to step 21.
- If you select to not print any labels or tags, the Summary Information screen appears. Go to step 23.

15. On the Sort Wizard keeper tags information screen, enter information required to print the keeper tags for your mailing. For information about completing this screen, see “Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen” on page 41.

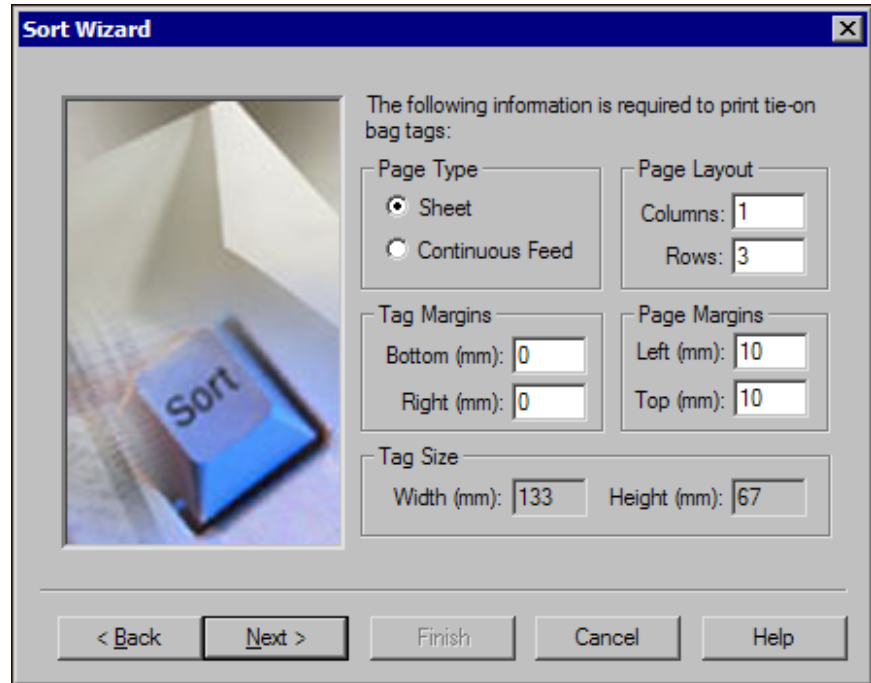
 A keeper tag, or bag label, is a thin cardboard label that contains information about your mailing. You must insert a keeper tag in the label holder on each bag in your mailing. The keeper tag must detail the contents and destination of the bag.

16. Click **Next**.

- If, on the Sort Wizard mailing reports screen, you mark **Tie-On Tags**, the Sort Wizard tie-on tags information screen appears. Go to step 17.
- If, on the Sort Wizard mailing reports screen, you do not mark **Tie-On Tags**, the Sort Wizard summary information screen appears. Go to step 23.

 A tie-on bag tag is an eyelet tag that is affixed to a large or small bag with string or a plastic cable tie.

17. On the Sort Wizard tie-on bag tags information screen, enter information required to print the tie-on bag tags for your mailing. For information about completing this screen, see “Sort Wizard Tie-On Bag Tags Information Screen” on page 43.



The Sort Wizard dialog box is shown with the following settings:


Section	Field	Value
Page Type	Sheet	<input checked="" type="radio"/>
	Continuous Feed	<input type="radio"/>
Page Layout	Columns	1
	Rows	3
Tag Margins	Bottom (mm)	0
	Right (mm)	0
Page Margins	Left (mm)	10
	Top (mm)	10
Tag Size	Width (mm)	133
	Height (mm)	67

Buttons at the bottom: < Back, Next >, Finish, Cancel, Help.

18. Click **Next**. The Sort Wizard summary information screen appears. Go to step 23.




19. On the Sort Wizard container labels screen, enter information required to print the container labels for your mailing. For information about completing this screen, see “Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen” on page 41.

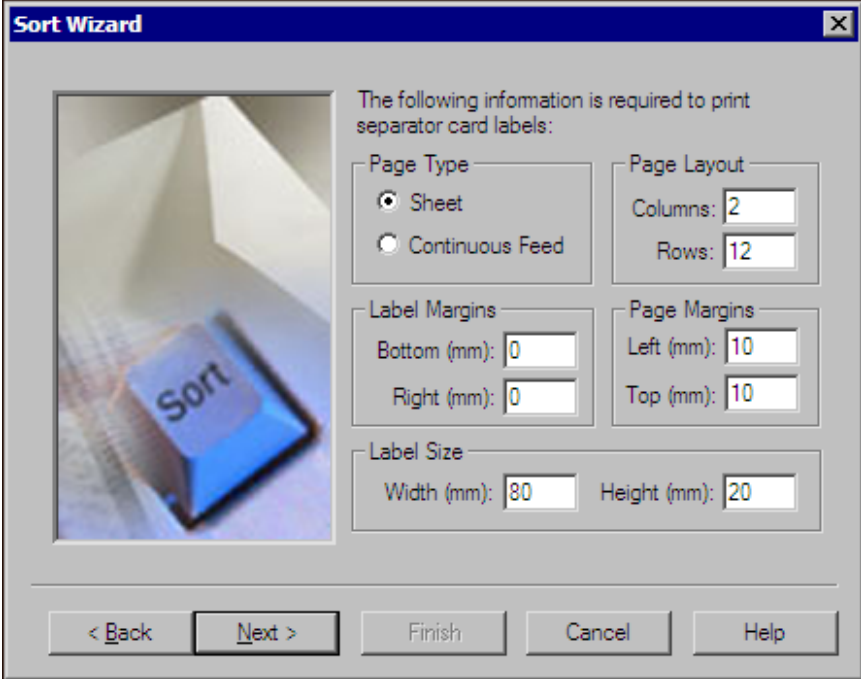
 A container label is a thin cardboard label that contains information about your mailing. You must insert a container label in the label holder attached to each hard sided container. The container label must detail the contents and destination of the container.

20. Click **Next**.

- If, on the Sort Wizard mailing reports screen, you mark **Separator Card Labels**, the Sort Wizard separator card labels information screen appears. Go to step 21.
- If, on the Sort Wizard mailing reports screen, you do not mark **Tie-On Tags**, the Sort Wizard summary information screen appears. Go to step 23.

 A separator card is a thin rigid cardboard piece used to indicate a break between groupings in a hard sided container. You must place the separator card in front of the first mail piece in each grouping and can use a separator card label to identify the grouping.

21. On the Sort Wizard separator card labels screen, enter information required to print the separator card labels for your mailing. For information about completing this screen, see “Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen” on page 41.



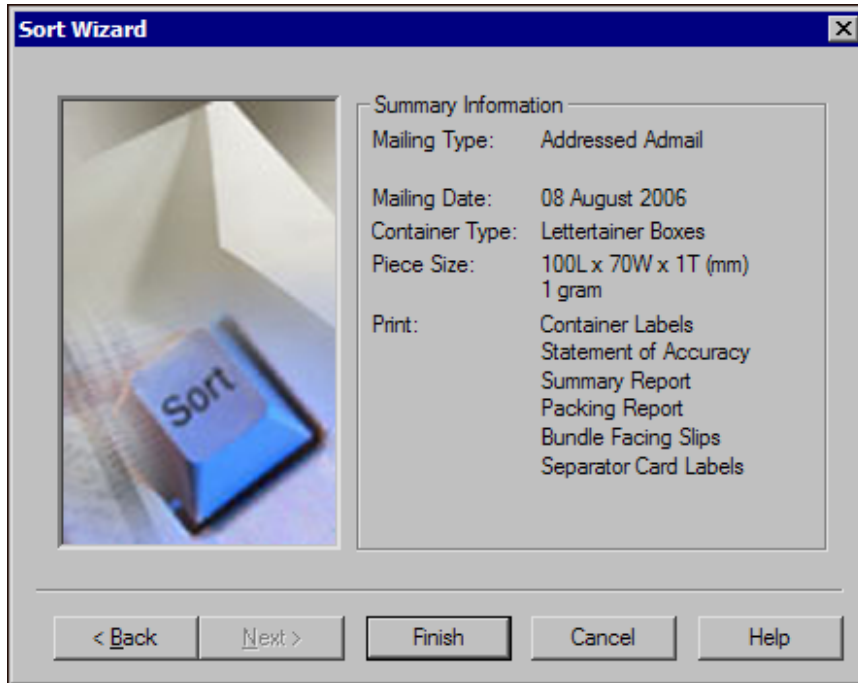
The Sort Wizard dialog box is shown, titled "Sort Wizard". It contains a preview image of a separator card with the word "Sort" on it. The dialog box is divided into several sections for configuring the separator card labels:

- Page Type:** Radio buttons for ☒ Sheet and ☐ Continuous Feed.
- Page Layout:** Input fields for Columns: 2 and Rows: 12.
- Label Margins:** Input fields for Bottom (mm): 0 and Right (mm): 0.
- Page Margins:** Input fields for Left (mm): 10 and Top (mm): 10.
- Label Size:** Input fields for Width (mm): 80 and Height (mm): 20.

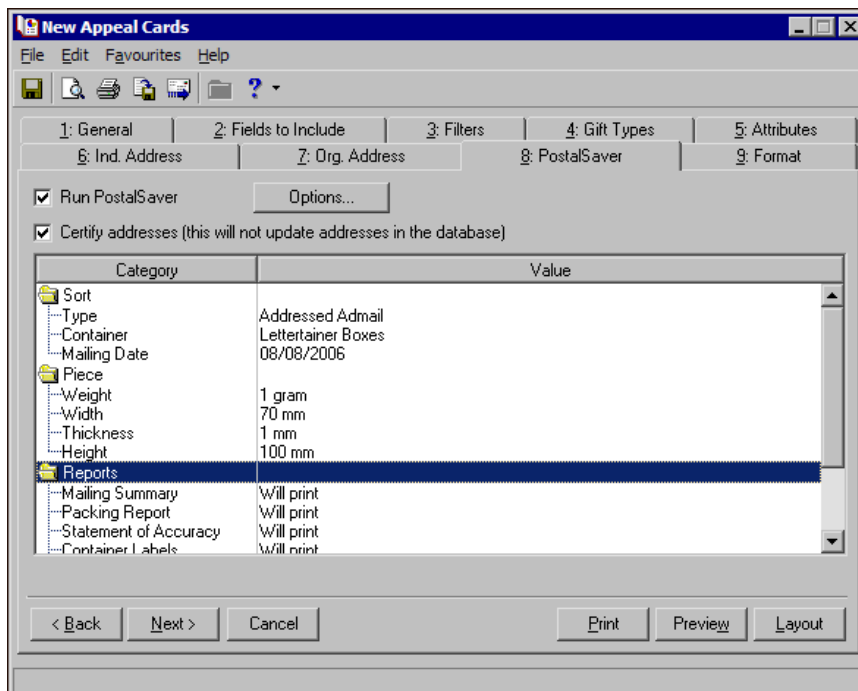
At the bottom of the dialog box are five buttons: "< Back", "Next >", "Finish", "Cancel", and "Help".

22. Click **Next**. The Sort Wizard summary information screen appears.

23. On the Sort Wizard summary information screen, a listing of the selections you made appears. To adjust any selections, click **Back** to return to the appropriate screen. For more information about this screen, see “Sort Wizard Summary Information Screen” on page 44.



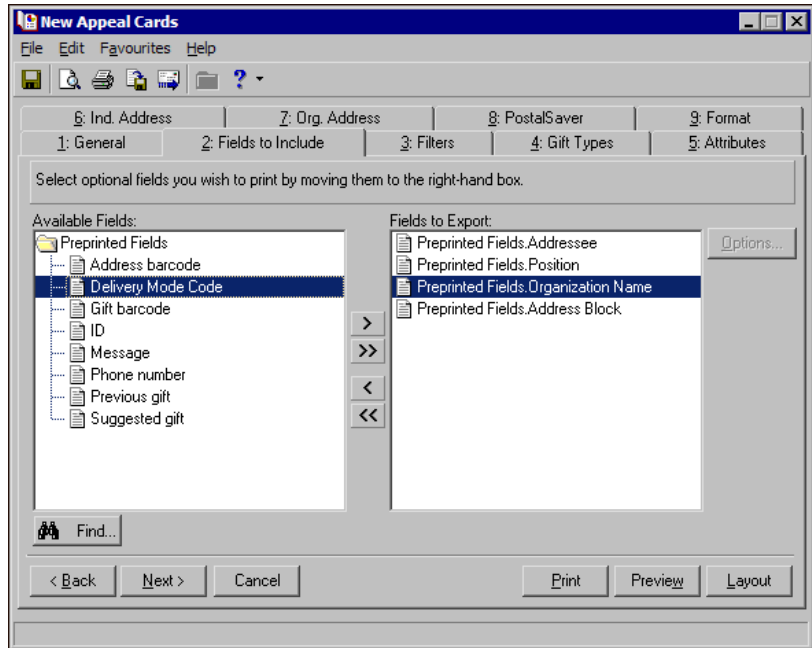
24. Click **Finish**. The reports and tags you selected print to the chosen printers. You return to the PostalSaver tab in *Mail* with your selections defined.



25. To preview the mailing, click **Preview**.

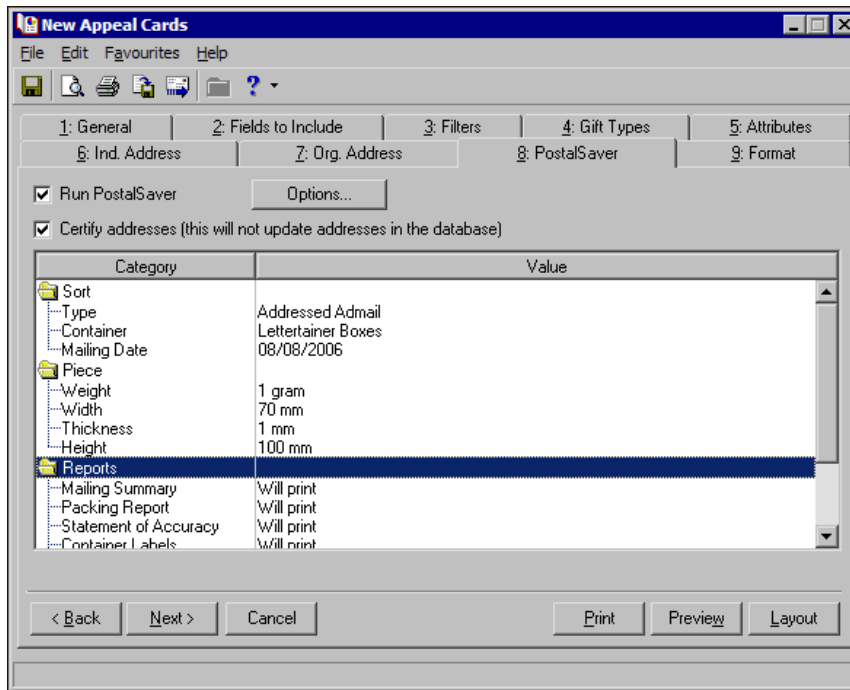
If you have not selected the **Delivery Mode Code** field on the Fields to Include tab of the mail task, a message appears to tell you so. To include the **Delivery Mode Code** field in the mail task:

- a. Click **OK**. You return to the Fields to Include tab to make the field selection necessary to run *PostalSaver*.



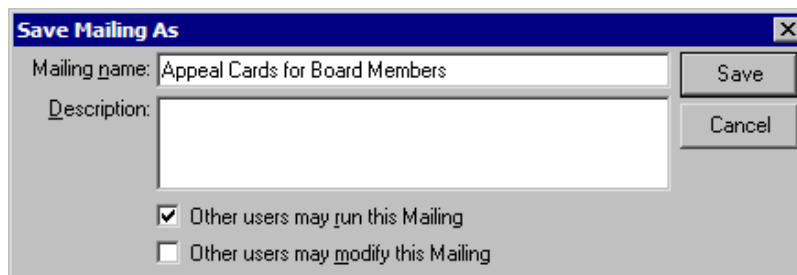
- b. In the **Available Fields** box, select **Delivery Point Code** and click the single right arrow to move it to the **Fields to Export** box.
  - c. Click **Preview** again.
26. A message appears to tell you the mailing is being prepared. When the mailing is prepared, the preview screen appears. To close the preview, click the red “X” in the top left corner of the preview screen. You return to the mail task.

27. Select the PostalSaver tab.



28. To save the parameter file:

- From the menu bar, select **File, Save**. The Save Mailing As screen appears.



- Enter a name and description to help identify the parameter file.
- Select whether other users can run or modify the mailing.
- Click **Save**. To reuse the same *PostalSaver* settings when you run *PostalSaver* on another mailing, click **Options** and select **Load options from** to select this parameter file.

29. To close the mail task, from the menu bar, select **File, Close**. You return to the Mail page.

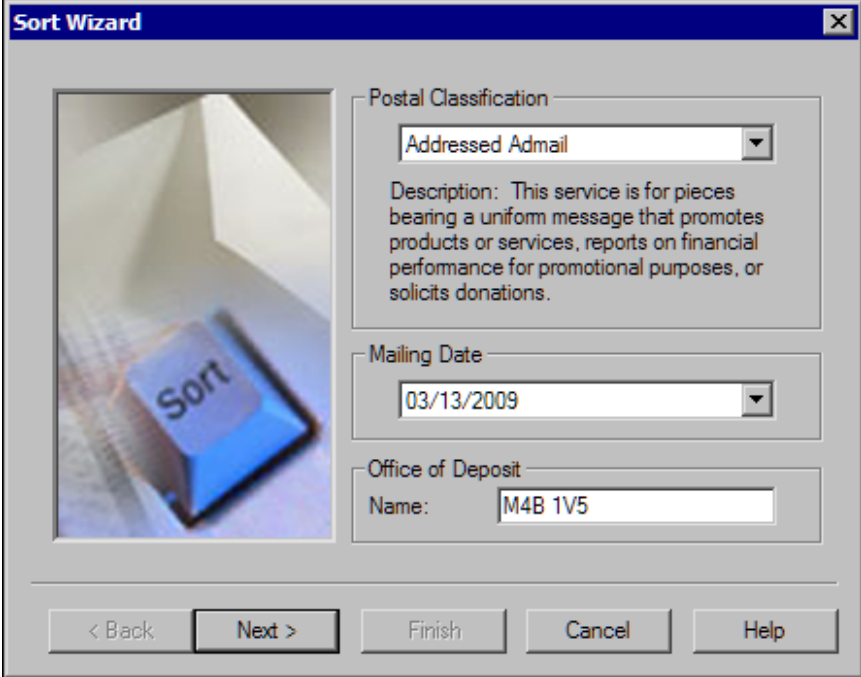
## Sort Wizard Postal Classification Screen

On the postal classification screen of the Sort Wizard, you select the postal service your mailing requires. On this screen, you also enter the date of the mailing and the post office where you will deposit the mailing.

 For more information about sorting mailings or qualifying for postal discounts, contact your nearest post office or visit the Online Business Centre at [www.canadapost.ca/obc](http://www.canadapost.ca/obc).

➤ **Complete the Sort Wizard postal classification screen**

1. Under **Postal Classification**, select the postal service your mailing requires. For information about the **Postal Classification** options, see “Postal Classifications” on page 32.



The screenshot shows the 'Sort Wizard' dialog box with a blue title bar. On the left is a graphic of a white envelope with a blue 'Sort' label. The right side contains three sections: 'Postal Classification' with a dropdown menu set to 'Addressed Admail' and a description; 'Mailing Date' with a dropdown menu set to '03/13/2009'; and 'Office of Deposit' with a text field containing 'M4B 1V5'. At the bottom are five buttons: '< Back', 'Next >', 'Finish', 'Cancel', and 'Help'.

2. Under **Mailing Date**, enter the date you send the mailing. To select the date from a calendar, click the drop-down arrow.
3. Under **Office of Deposit**, enter the postal code for post office where you deposit the mailing.
4. Click **Next**. The Sort Wizard container type and piece dimensions screen appears.

## Postal Classifications

On the postal classification screen of the Sort Wizard, you select the postal service your mailing requires.

**Addressed Admail.** Addressed Admail is a direct marketing medium that provides the ability to personalize your mailing and target promotional messages to specific consumers or prospects. Addressed Admail mailing must be mailed in quantities of at least 1,000 pieces or 5,000 AdCard pieces. For mail pieces that bear a uniform message to promote products or services, report on financial performance for promotional purposes, or solicit donations, select “Addressed Admail”.

**Dimensional Addressed Admail.** For Letter Carrier Presort (LCP) mail pieces that are too thick to qualify for the Addressed Admail service, select “Dimensional Addressed Admail”.

**Incentive Lettermail.** The Incentive Lettermail postal service offers discounts over standard Lettermail service by introducing additional deposit, presortation, and address accuracy requirements. To qualify for these discounts, select “Incentive Lettermail”.

**Publications Mail.** For newspapers, magazines, and periodicals that provide news and information to the public, contain less than 70% advertising in more than half the issues mailed with a 12-month period, and are addressed to a subscriber, nonsubscriber, or newsdealer in Canada, select “Publications Mail”.

## Sort Wizard Container Type and Piece Dimensions Screen

On the Sort Wizard container type and piece dimensions screen, you select the type of the container used to deliver the mail to the post office. You also enter the dimensions of an individual mail piece representative of the mailing.

### ➤ Complete the Sort Wizard container type and piece dimensions screen

1. Under **Container Type**, select the type of container used to deposit the mailing at the post office. You must use the same type of container for the entire deposit. The **Container Type** options vary depends on the selected postal classification. For more information about the available container types, see “Container Types” on page 34.

2. Under **Piece Dimensions**, enter the specifications of an individual mail piece representative of the mailing.
  - In the **Length (mm)** field, enter the length of the mail piece, to the nearest whole number, in millimeters (mm). Facing the address side of a mail piece, the length is its largest dimension.

- In the **Width (mm)** field, enter the width of the mail piece, to the nearest whole number, in millimeters (mm). Facing the address side of a mail piece, the width is its shortest dimension.
- In the **Thickness (mm)** field, enter the thickness of the mail piece in millimeters (mm). The thickness is the dimension perpendicular to the address side of a mail piece.
- In the **Weight (g)** field, enter the weight of the mail piece in grams (g).

The **Piece Dimensions** entered must conform to the Canada Post regulations for the selected postal classification.

Postal Classification	Regulation Length Range	Regulation Width Range	Regulation Thickness Range	Regulation Weight Range
Addressed AdMail	100 mm to 380 mm	70 mm to 100 mm	0.18 mm to 20 mm	1 g to 500 g
Dimensional Addressed AdMail	140 mm to 300 mm	90 mm to 130 mm	20 mm to 35 mm	1 g to 500 g
Incentive Lettermail	140 mm to 380 mm	90 mm to 107 mm	0.18 mm to 20 mm	10 g to 500 g
Publications Mail	140 mm to 600 mm	90 mm to 140 mm	0.18 mm to 90 mm	1 g to 1360 g

3. Click **Next**. The Sort Wizard mailing reports screen appears. For information about this screen, see “Sort Wizard Mailing Reports Screen” on page 35.

## Container Types

Canada Post accepts mailings in four types of containers, including two types of hard sided containers and two types of bags. When you deposit a mailing at the post office, you must use the same type of container for the entire mailing. On the Sort Wizard container type and piece dimensions screen, in the **Container Type** frame, you select the type of container used for the mailing. The **Container Type** options vary depends on the selected **Postal Classification**.

**Hard Sided Containers.** There are two types of hard sided containers. For Short and Long (S/L) mailings, use Lettertainers. For Oversize (O/S) mailings, use Flats tabs. The maximum weight of a hard sided container, including the container itself, cannot exceed 25 kg. When you use hard sided containers, you must face all bundles in the same direction. You must also deposit all containers with lids, unless other local arrangements have been made with a Canada Post representative.

**Large Bags (A-3).** For Short and Long (S/L) or Oversize (O/S) mailings, you can select Large Bags (A-3). Each large bag must contain at least six bundles or weigh at least 7 kg. You cannot use large bags for Dimensional Addressed AdMail or Incentive Lettermail mailings.

**Small Bags (A-6).** For Short and Long (S/L) or Oversize (O/S) mailings, you can select Small Bags (A-6). Each small bag must contain at least four bundles or weigh at least 3.5 kg. You cannot use small bags for Dimensional Addressed AdMail or Incentive Lettermail mailings.



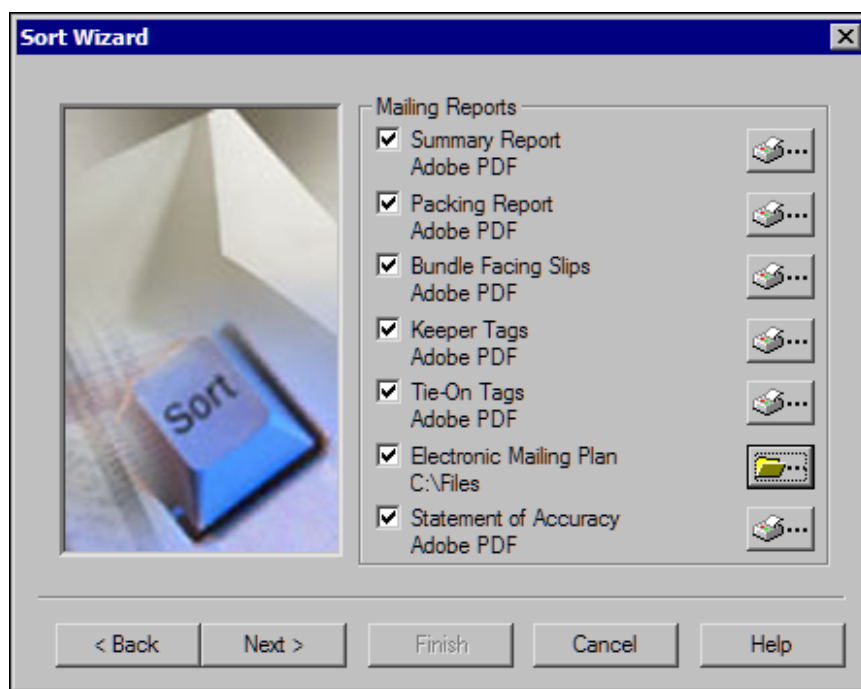
## Sort Wizard Mailing Reports Screen

On the Sort Wizard mailing reports screen, you select the reports and labels to print for your mailing. When you select a report on this screen, you can set up the report to print and designate its destination printer. You can also select to save an electronic mailing plan to submit to Canada Post.

### ➤ Complete the Sort Wizard mailing reports screen

On the Sort Wizard mailing reports screen, the reports and labels that are available to print appear. The reports and labels that appear vary depending on the selected container type.

1. Under **Mailing Reports**, select the reports and labels to generate. To select a report or label, mark its checkbox. For information about the reports and labels that appear, see “Mailing Reports” on page 36.



2. When you select a report or label, the Printer button is enabled. To set up the print job and designate the printer for the report, click this button. The Print Setup screen appears.

Configure how to print the report or labels and designate a destination printer. When you finish, click **OK**. You return to the Sort Wizard mailing reports screen, and the selected printer name appears below the name of the selected report or label.

3. If you mark **Electronic Mailing Plan**, the Open file button is enabled. To select the location to save the mailing plan as an XML file, click this button. The Browse for Folder screen is enabled.

Browse to the location to save the file and click **OK**. You return to the Sort Wizard mailing reports screen, and the selected path appears under **Electronic Mailing Plan**.

#### 4. Click **Next**.

- If you mark **Summary Report, Packing Report, or Statement of Accuracy**, the Sort Wizard report information screen appears. For information about this screen, see “Sort Wizard Report Information Screen” on page 37.
- If you mark **Bundle Facing Slips** but *not* **Summary Report, Packing Report, or Statement of Accuracy**, the Sort Wizard bundle facing slips information screen appears. For information about this screen, see “Sort Wizard Bundle Facing Slips Information Screen” on page 39.
- If you select a **Container Type** of Large Bags (A-3) or Small Bags (A-6) and mark **Keeper Tags** but *not* **Summary Report, Packing Report, Bundle Facing Slips, or Statement of Accuracy**, the Sort Wizard keeper tags information screen appears. For information about this screen, see “Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen” on page 41.
- If you select a **Container Type** of Large Bags (A-3) or Small Bags (A-6) and mark **Tie-On Tags** but *not* **Summary Report, Packing Report, Bundle Facing Slips, Keeper Tags, or Statement of Accuracy**, the Sort Wizard tie-on tags information screen appears. For information about this screen, see “Sort Wizard Tie-On Bag Tags Information Screen” on page 43.
- If you select a **Container Type** of Hard Sided Containers and mark **Container Labels** but *not* **Summary Report, Packing Report, Bundle Facing Slips, or Statement of Accuracy**, the Sort Wizard container labels information screen appears. For information about this screen, see “Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen” on page 41.
- If you select a **Container Type** of Hard Sided Containers and mark **Separator Card Labels** but *not* **Summary Report, Packing Report, Bundle Facing Slips, Container Labels, or Statement of Accuracy**, the Sort Wizard separator card labels information screen appears. For information about this screen, see “Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen” on page 41.
- If you select to not print any reports or labels or mark only **Electronic Mailing Plan**, the Sort Wizard summary information screen appears.

## Mailing Reports

On the Sort Wizard mailing reports screen, you select the reports and labels to print. The reports and labels that appear vary depending on the selected container type.

**Summary Report.** The Summary Report provides the presortation details and parameters associated with the mailing. When you deposit your mailing at the post office, you must submit a Summary Report.

**Packing Report.** For multiple shipments, the Packing Report provides a document for each deposit site with the same mailing date and statement of mailing serial number. When you deposit multiple mailings at the post office, we recommend you submit a Packing Report for each individual shipment so the receiving post office can verify the mailing.

**Bundle Facing Slips.** A bundle facing slip, also known as a bundle label, must be applied to each bundle that is not a Level 1 Delivery Facility bundle. You must securely fasten a facing slip to each bundle and must indicate the National Presortation Schematic (NPS) routing information and postal classification.

**Keeper Tags.** A keeper tag, also known as a bag label, is a thin cardboard label that contains information and is inserted in the label holder on large or small bags. The keeper tag must detail the contents and destination of the bag.

**Tie-on Tags.** A tie-on tag is an eyelet tag that is affixed to a large or small bag with string or a plastic cable tie.

**Container Labels.** A container label is a thin cardboard label that contains information and is inserted in the label holder attached to a hard sided container. The container label must detail the contents and destination of the container.

**Separator Card Labels.** A separator card is a thin rigid cardboard piece used to indicate a break between groupings in a hard sided container. You must place the separator card in front of the first mail piece in each grouping. You can also use a separator card label to identify the grouping.

**Electronic Mailing Plan.** An electronic mailing plan generates an \*.xml file that contains information about the mailing, such as volume and mailing date. To help process the mailing, you can submit the file to Canada Post through *Electronic Shipping Tools* (EST). Effective July 20, 2009, you must import a mailing plan into EST for mailings with a postal classification of Addressed Admail or Publications Mail.

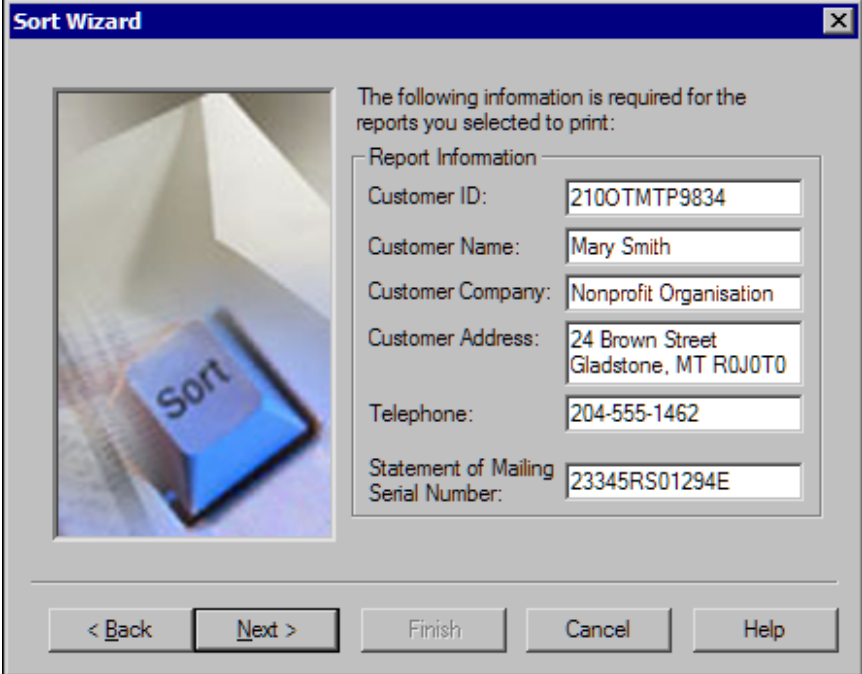
**Statement of Accuracy.** The Statement of Accuracy (SOA) reports the percentage of accurate addresses on a mailing list. If you select a postal classification of Incentive Lettermail, you must maintain a valid copy of the SOA on file in the event Canada Post requests a copy.

## Sort Wizard Report Information Screen

On the Sort Wizard report information screen, you enter information about the mailing and the Canada Post customer associated with it. The information you enter on this screen appears on the Summary Report, Packing Report, and Statement of Accuracy.

➤ **Complete the Sort Wizard report information screen**

1. In the **Customer ID** field, enter your Canada Post customer contract ID number.



The following information is required for the reports you selected to print:

Report Information

Customer ID: 2100TMTP9834

Customer Name: Mary Smith

Customer Company: Nonprofit Organisation

Customer Address: 24 Brown Street  
Gladstone, MT R0J0T0

Telephone: 204-555-1462

Statement of Mailing Serial Number: 23345RS01294E

< Back Next > Finish Cancel Help

2. In the **Customer Name** field, enter the name of the Canada Post customer associated with the mailing.
3. In the **Customer Company** field, enter the name of the company associated with the mailing.
4. In the **Customer Address** field, enter the address of the Canada Post customer associated with the mailing.
5. In the **Telephone** field, enter the telephone number of the Canada Post customer associated with the mailing.
6. In the **Statement of Mailing Serial Number** field, enter the number of the Order (Statement of Mailing) submitted for the mailing. For each mailing, you must submit an Order (Statement of Mailing).
7. Click **Next**.
  - If you select to print bundle facing slips, the Sort Wizard bundle facing slips information screen appears. For information about this screen, see “Sort Wizard Bundle Facing Slips Information Screen” on page 39.
  - If you select a container type of Large Bags (A-3) or Small Bags (A-6) and select to print keeper tags but *not* bundle facing slips, the Sort Wizard keeper tags information screen appears. For information about this screen, see “Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen” on page 41.

- If you select a container type of Large Bags (A-3) or Small Bags (A-6) and select to print tie-on tags but *not* bundle facing slips or keeper tags, the Sort Wizard tie-on tags information screen appears. For information about this screen, see “Sort Wizard Tie-On Bag Tags Information Screen” on page 43.
- If you select a container type of Hard Sided Containers and select to print container labels but *not* bundle facing slips, the Sort Wizard container labels information screen appears. For information about this screen, see “Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen” on page 41.
- If you select a container type of Hard Sided Containers and select to print separator card labels but *not* bundle facing slips or container labels, the Sort Wizard separator card labels information screen appears. For information about this screen, see “Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen” on page 41.
- If you select to not print any slips, tags, or labels, the Sort Wizard summary information screen appears.


## Sort Wizard Bundle Facing Slips Information Screen

For each bundle that is not a Level 1 Delivery Facility bundle, you must securely fasten a bundle facing slip, also known as a bundle label. The bundle facing slip must indicate the *National Presortation Schematic* (NPS) routing information and the postal classification. On the Sort Wizard bundle facing slip information screen, you enter information required to print bundle facing slips.

➤ **Complete the Sort Wizard bundle facing slips information screen**

1. Under **Page Type**, select whether to print the bundle facing slips by sheet or as a continuous feed.

2. Under **Page Layout**, enter the number of **Columns** on each page.
3. If you select to print by sheet, the **Rows** field is enabled. Enter the number of rows on each sheet.
4. Under **Facing Slip Margins**, enter the distance, in millimeters, to allow for the margins of each bundle facing slip.
  - In the **Bottom (mm)** field, enter the distance to allow for the bottom margin of each bundle facing slip.
  - In the **Right (mm)** field, enter the distance to allow for the right margin of each bundle facing slip.
5. Under **Page Margins**, enter the distance, in millimeters, to allow for the margins of the page.
  - In the **Left (mm)** field, enter the distance to allow for the left margin of each page.
  - If you select to print by sheet, the **Top (mm)** field is enabled. Enter the distance to allow for the top margin of the page.
6. Click **Next**.
  - If you select a container type of Large Bags (A-3) or Small Bags (A-6) and select to print keeper tags but *not* bundle facing slips, the Sort Wizard keeper tags information screen appears. For information about this screen, see “Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen” on page 41.

 Per Canada Post regulations, a bundle facing slip must be 95 mm wide by 86 mm high. Under **Facing Slip Size**, these values appear and cannot be changed.

- If you select a container type of Large Bags (A-3) or Small Bags (A-6) and select to print tie-on tags but *not* bundle facing slips or keeper tags, the Sort Wizard tie-on tags information screen appears. For information about this screen, see “Sort Wizard Tie-On Bag Tags Information Screen” on page 43.
- If you select a container type of Hard Sided Containers and select to print container labels but *not* bundle facing slips, the Sort Wizard container labels information screen appears. For information about this screen, see “Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen” on page 41.
- If you select a container type of Hard Sided Containers and select to print separator card labels but *not* bundle facing slips or container labels, the Sort Wizard separator card labels information screen appears. For information about this screen, see “Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen” on page 41.
- If you select to not print any tags or labels, the Sort Wizard summary information screen appears.

## Sort Wizard Keeper Tags, Separator Card Labels, or Container Labels Information Screen

A keeper tag, or bag label, is a thin cardboard label that contains information about your mailing. If you select a container type of Large Bag (A-3) or Small Bag (A-6), you must insert a keeper tag in the label holder on each bag to identify its contents and destination.

A separator card is a thin rigid cardboard piece used to indicate a break between groupings in a hard sided container. If you select a container type of Hard Sided Container, you must place the separator card in front of the first mail piece in each grouping and can use a separator card label to identify the grouping.

A container label is a thin cardboard label that contains information about your mailing. If you select a container type of Hard Sided Container, you must insert a container label in the label holder attached to each hard sided container. The container label must detail the contents and destination of the container.

On the Sort Wizard keeper tags information screen, Sort Wizard separator card labels information screen, or Sort Wizard container labels information screen, you enter information required to print the applicable label. The information and options on these screens are identical.

➤ **Complete the Sort Wizard keeper tags, separator card labels, or container labels information screen**

1. Under **Page Type**, select whether to print the labels by sheet or as a continuous feed.

The following information is required to print separator card labels:

**Page Type**  
☒ Sheet  
☐ Continuous Feed

**Page Layout**  
Columns: 2  
Rows: 12

**Label Margins**  
Bottom (mm): 0  
Right (mm): 0

**Page Margins**  
Left (mm): 10  
Top (mm): 10

**Label Size**  
Width (mm): 80  
Height (mm): 20

< Back   Next >   Finish   Cancel   Help

2. Under **Page Layout**, enter the number of columns on each page.
3. If you select to print by Sheet, the **Rows** field is enabled. Enter the number of rows on each sheet.
4. Under **Label Margins**, enter the distance, in millimeters, to allow for the margins of each label.
  - In the **Bottom (mm)** field, enter the distance to allow for the bottom margin of each label.
  - In the **Right (mm)** field, enter the distance to allow for the right margin of each label.
5. Under **Page Margins**, enter the distance, in millimeters, to allow for the margins of the page.
  - In the **Left (mm)** field, enter the distance to allow for the left margin of each page.
  - If you select to print by Sheet, the **Top (mm)** field is enabled. Enter the distance to allow for the top margin of the page.



6. On the Sort Wizard separator card labels information screen, the **Label Size** frame is enabled. Enter, in millimeters, the **Width** and **Height** of each separator card label.
7. Click **Next**.
  - If you select a container type of Large Bags (A-3) or Small Bags (A-6) and select to print tie-on tags, the Sort Wizard tie-on tags information screen appears. For information about this screen, see “Sort Wizard Tie-On Bag Tags Information Screen” on page 43.
  - If you select a container type of Hard Sided Containers and need to configure how to print separator card labels or container labels, the Sort Wizard information screen for the applicable label appears. To configure the printing of the labels, repeat the procedure.
  - If you select a container type of Large Bags (A-3) or Small Bags (A-6) and select to *not* print tie-on tags, or if the printing for all labels is configured, the Sort Wizard summary information screen appears.

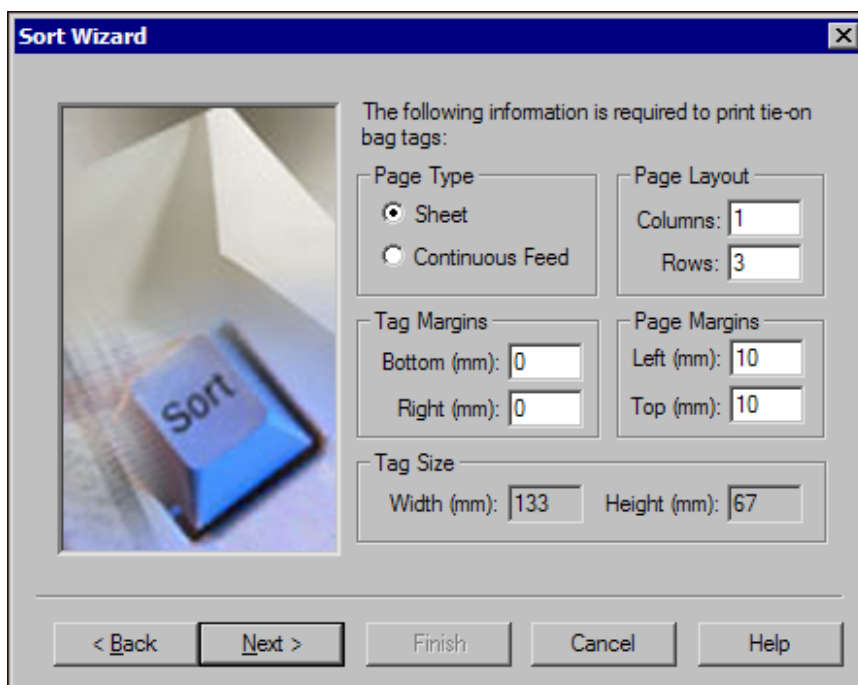
 Per Canada Post regulations, a keeper tag must be 86 mm wide by 24 mm high. A container label must be 133 mm wide by 64 mm high. Under **Label Size** on each label type's respective information screen, these values appear and cannot be changed.

## Sort Wizard Tie-On Bag Tags Information Screen

A tie-on tag is an eyelet tag that is affixed to a large or small bag with string or a plastic cable tie. On the Sort Wizard tie-on bag tags information screen, you enter information required to print the tie-on bag tags.

### ➤ Complete the Sort Wizard tie-on bag tags information screen

1. Under **Page Type**, select whether print the tags by sheet or as a continuous feed.



The following information is required to print tie-on bag tags:

<b>Page Type</b> <input checked="" type="radio"/> Sheet <input type="radio"/> Continuous Feed	<b>Page Layout</b> Columns: 1 Rows: 3
<b>Tag Margins</b> Bottom (mm): 0 Right (mm): 0	<b>Page Margins</b> Left (mm): 10 Top (mm): 10
<b>Tag Size</b> Width (mm): 133    Height (mm): 67	

< Back   Next >   Finish   Cancel   Help

2. Under **Page Layout**, enter the number of columns on each page.

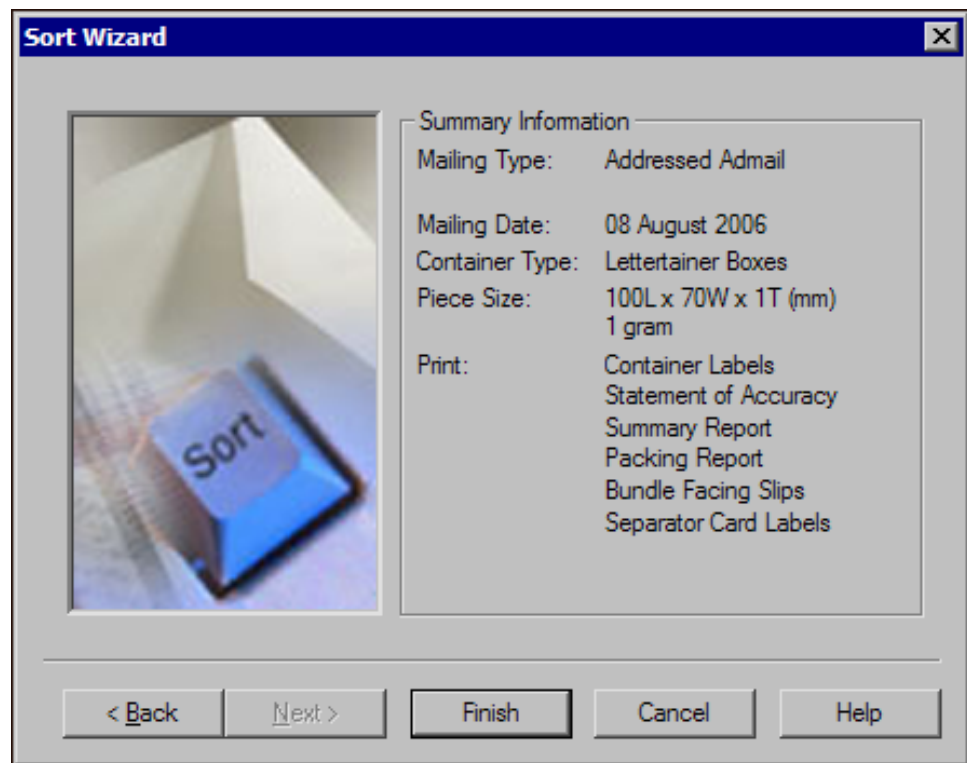


Per Canada Post regulations, a tie-on bag tag must be 133 mm wide by 67 mm high. Under **Tag Size** on the Sort Wizard tie-on bag tags information screen, these values appear and cannot be changed.

3. If you select to print by Sheet, the **Rows** field is enabled. Enter the number of rows on each sheet.
4. Under **Tag Margins**, enter the distance, in millimeters, to allow for the margins of each tag.
  - In the **Bottom (mm)** field, enter the distance to allow for the bottom margin of each tag.
  - In the **Right (mm)** field, enter the distance to allow for the right margin of each tag.
5. Under **Page Margins**, enter the distance, in millimeters, to allow for the margins of the page.
  - In the **Left (mm)** field, enter the distance to allow for the left margin of each page.
  - If you select to print by Sheet, the **Top (mm)** field is enabled. Enter the distance to allow for the top margin of the page.
6. Click **Next**. The Summary Information screen appears.

## Sort Wizard Summary Information Screen

On the Sort Wizard summary information screen, a list of the *PostalSaver* options selected for the mail task parameter file appears. This information includes the selected mailing type, mailing date, container type, and piece size. A list of the reports and labels selected to print also appears.



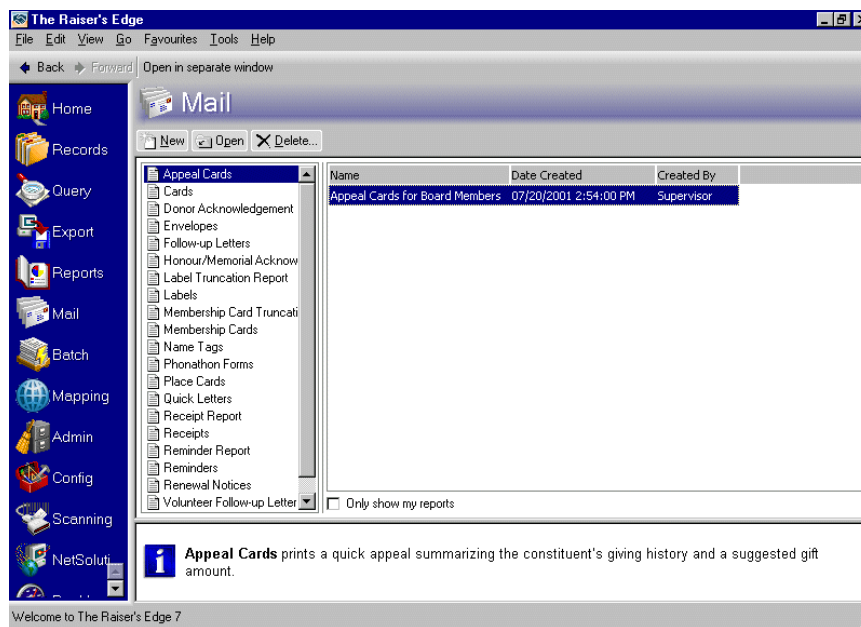
If the *PostalSaver* options are incorrect, click **Back** and adjust the parameter file as necessary. After you correctly set the parameter file for the mailing, click **Finish**.

## Load PostalSaver Options from a Parameter File


*PostalSaver* automates the process to sort mailings and complete reports to qualify mailings for postal discounts. With your selections on the PostalSaver tab, you create a parameter file that defines how to sort the mailing according to the Postal Code and Canada Post regulations. After you create a parameter file, you can use it as a template for future mailings. When you copy an existing parameter file, you use the existing file as a template for the new one and can easily modify your *PostalSaver* options without overwriting the previous settings.


### ➤ Copy the PostalSaver options from an existing parameter file


1. On the Raiser's Edge bar, click **Mail**. The Mail page appears.



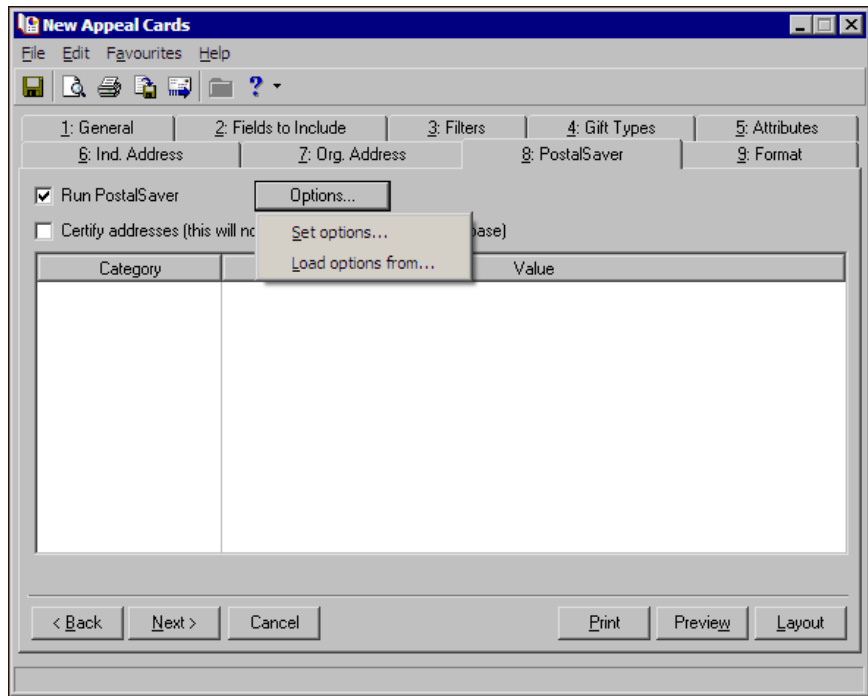
2. From the list of Mail tasks on the left, select a task.
3. In the grid on the right, select a mailing and click **Open** on the action bar or, to create a new mailing, click **New**. For more information about how to create a mailing, see the *Mail Guide*. The new mail task screen appears.

 For this procedure, Appeal Cards is used as an example mail task. Because the steps are similar, procedures for other mail tasks with the PostalSaver tab are not repeated in this section. Depending on which options you choose for other mail tasks, you may skip some of these steps and screens.

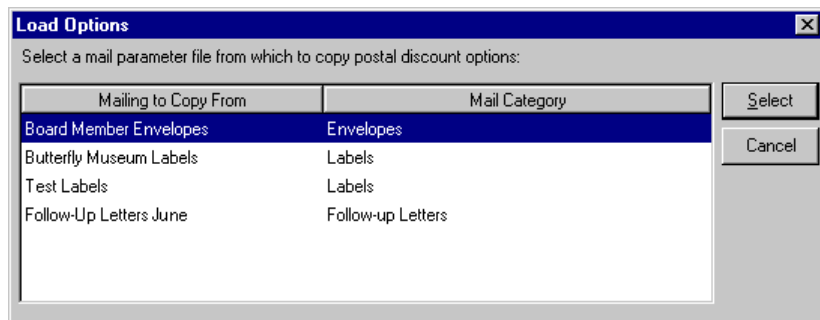
 Include an address field on the Fields to Include tab or the PostalSaver tab will not be accessible. Make sure also to include the **Delivery Mode Code** and **Address barcode** fields or a warning message appears when you try to print the mailing.

 Marking **Certify addresses** certifies the addresses for this particular mailing only. Address information is not corrected or certified on the constituent record. You must manually update changed addresses on the constituent record.

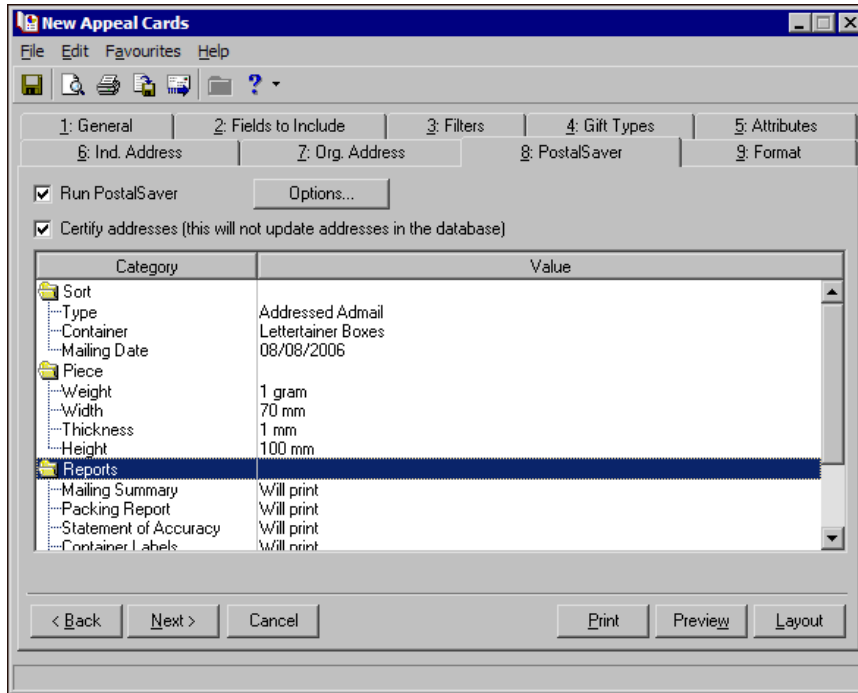
4. Select the PostalSaver tab.
5. Mark **Run PostalSaver**.



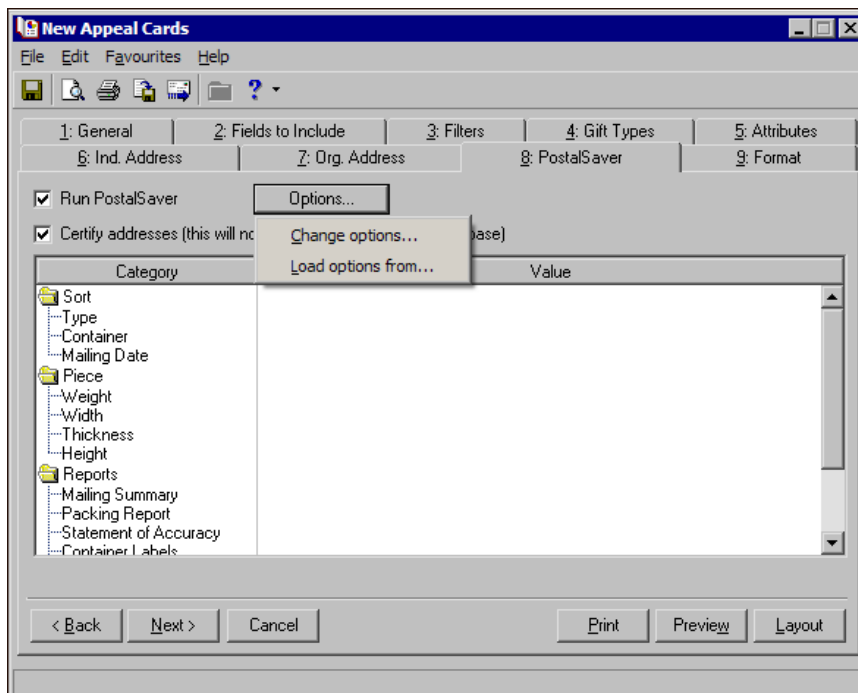
6. If you use *AddressAccelerator* as your data service and, in User Options, enter a valid path to the *AddressAccelerator* data files, the **Certify addresses** checkbox appears. To certify addresses for the mailing, mark this checkbox.
7. To use an existing parameter file for the mailing, click **Options** and select **Load options from**. The Load Options screen appears.



8. In the grid, the existing parameter files saved from previous mailings appear. To use an existing parameter file, select it in the grid and click **Select**. You return to the PostalSaver tab. In the **Category** and **Value** columns, a summary of the selected parameter file appears.



9. To change the *PostalSaver* options for your mailing, click **Options** and select **Change options**.



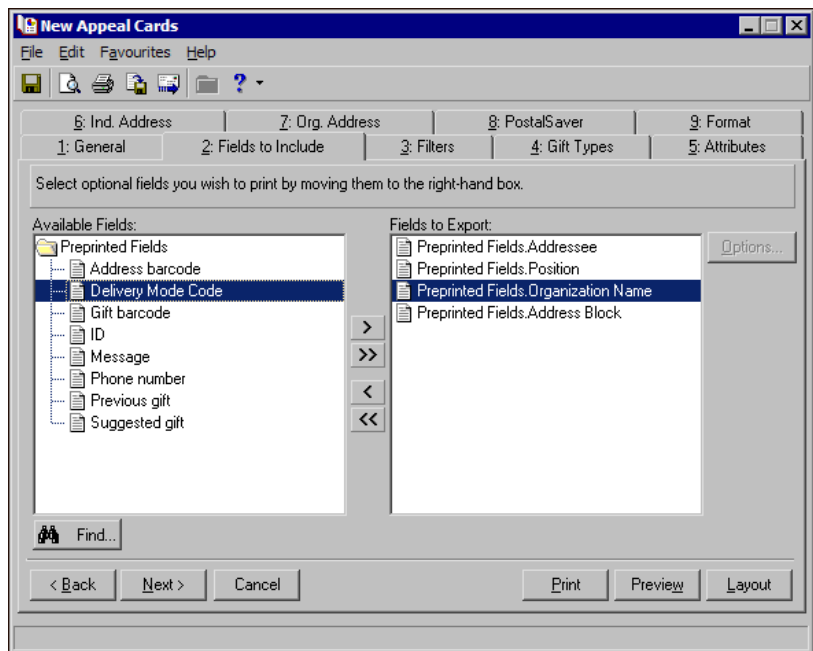
The Sort Wizard appears and displays the settings of the existing parameter file. Adjust the settings as necessary. To move through the screens of the Sort Wizard, click **Back** or **Next**. For information about the screens of the Sort Wizard, see “Run the Sort Wizard to Set PostalSaver Options” on page 18.

After you make the necessary adjustments, click **Finish** to return to the PostalSaver tab.

10. To preview the mailing, click **Preview**.

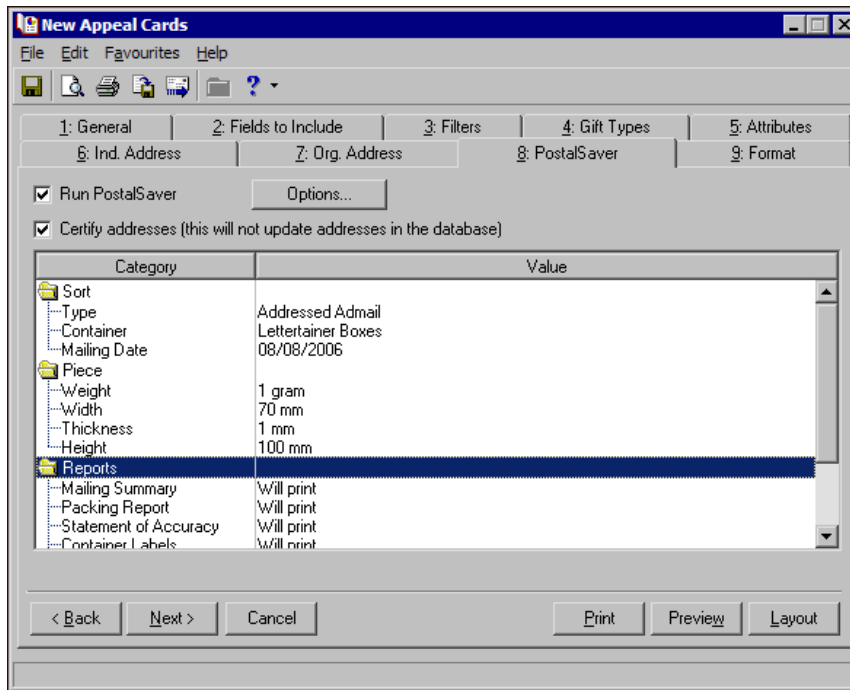
If you have not selected the **Delivery Mode Code** field on the Fields to Include tab of the mail task, a message appears to tell you so. Do as follows:

- a. Click **OK**. The Fields to Include tab appears so you can select the fields necessary to run *PostalSaver*.



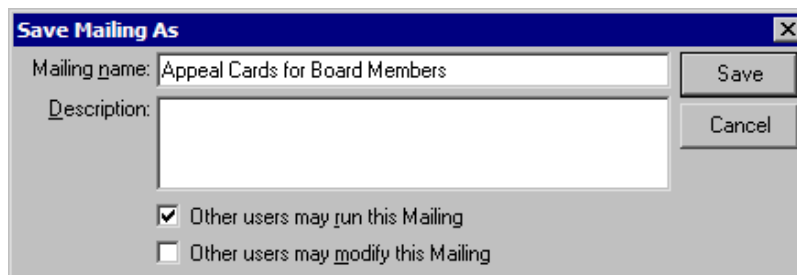
- b. In the **Available Fields** box, select **Delivery Point Code** and click the single right arrow to move it to the **Fields to Export** box.
  - c. Click **Preview** again.
11. A message appears to tell you the mailing is being prepared. When the mailing is prepared, the preview screen appears. To close the preview, click the red “X” in the top left corner of the preview screen. You return to the mail task.

12. Select the PostalSaver tab.



13. To save the parameter file:

- a. From the menu bar, select **File, Save**. The Save Mailing As screen appears.



- b. Enter a name and description to help identify the parameter file.
  - c. Select whether other users can run or modify the mailing.
  - d. Click **Save**. To reuse the same *PostalSaver* settings when you run *PostalSaver* on another mailing, click **Options** and select **Load options from** to select this parameter file.
14. To close the mail task, from the menu bar, select **File, Close**. You return to the Mail page.

 For more information about sorting mailings or qualifying for postal discounts, contact your nearest post office or visit the Online Business Centre at [www.canadapost.ca/obc](http://www.canadapost.ca/obc).





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